

How to Run Effective Meetings

A Workshop

Purpose: To present and discuss ideas for making your meetings more effective.

Learning Objectives:

1. To understand the elements of a successful meeting.
2. To learn how to use meeting management tools.
3. To develop an action plan to implement effective meeting management procedures at your council.

- Agenda:**
1. Overview of the elements of an effective meeting.
 2. Meeting Agenda.
 3. Meeting Location.
 4. Rules of Engagement.
 5. Job Aids.
 6. Preparing an action plan.
 7. Importance of Follow-up.

Limit: One Hour

Effective Meetings - An Overview

Think about meetings you have attended recently. What made them effective or ineffective? Prepare a list below of your thoughts. Rank the items on each list by their importance to making the meeting successful (effective) or unsuccessful (ineffective).

<u>Effective</u>	<u>Ranking</u>	<u>Ineffective</u>	<u>Ranking</u>

The facilitator will now ask you to share your lists with others in the class as we prepare a composite list.

The agenda for this workshop lists the elements of effective meetings, which will now be discussed in more detail.

Meeting Agendas

Why are agendas important for effective meetings? There's an old saying: "If you don't know where you're going, any road will get you there!" Can you think of other reasons agendas are important?

Agendas for meeting provide the **following benefits**:

1. Provides a road map for the meeting leader
2. Determines how to allocate time among presentation subjects and discussion items
3. Reminds participants of items they are presenting (if the agenda is published in advance of the meeting)
4. Keeps the meeting focused

If you accept the importance of having an agenda when you lead a meeting, there are some **cautions** that will make agenda usage more acceptable to the participants at your meeting.

1. Everyone should have an opportunity to provide input to the agenda. If inputs cannot be solicited in advance, the participants should be given the opportunity to review, modify and approve the agenda at the start of the meeting.
2. Review the minutes of the group's last meeting and include action items that are due at this meeting.
3. Every meeting must have a time limit - your participant's time is important! *Never increase the length of a meeting without the agreement of the participants in advance.* Seek approval at the start of the meeting (see item 1) if advance agreement is not possible.
4. Every item on the meeting should have a time limit for presentation and discussion. If you cannot adequately cover all items without going over your time limit, *cut some items from the agenda!*
5. A preliminary agenda should be sent to all participants at least two days before the scheduled meeting. Participants often forget they have an action item from the last meeting; the advance agenda gives them a reminder.

Meeting Location

Meetings should be held in a comfortable, convenient location *without distractions*. Elements of **comfort** include the size of the room, type of chairs, lighting, handicap access (if needed), room temperature and humidity. Elements of **convenience** include driving distance for all participants and availability of parking. Elements of **distraction** include noise from outside of the room, noise inside the room (fans, air conditioners, etc.), windows with distracting views, and interruptions by service personnel. If a meeting location does not meet the needs of all participants, try to find another location for your meeting.

Rules of Engagement

Meetings are not war (usually), but they function much better if everyone knows what to expect and has agreed to the rules. Rules of engagement must be established at your first meeting (or at least the first one you lead). The process for establishing rules of engagement takes four steps:

1. Tell participants that meetings run smoothly when there are expectations for conduct of the meeting that everyone has agreed to follow.
2. Brainstorm a list of possible rules.
3. Select the rules that everyone agrees they can follow.
4. Publish the Rules of Engagement in your minutes.

Listed below are some rules that have been used at meetings that you may want to consider in your brainstorming step:

- Start on time, end on time
- Everyone arrive on time, stay and participate
- No interruptions
- Don't exceed the time limit for an item
- Criticize ideas, not the people who suggest them
- Leave your "stripes" at the door
- Complete all action items
- Keep an open mind
- Leave the office at the office
- Use the Parking Lot

Many leaders have their group's Rules of Engagement printed in large letters and distributed to all participants. If the rules are numbered, participants can identify rule violations by number, rather than pointing out that an individual is breaking the rules. "We're not following rule number 3" is much easier to accept than "Mary is breaking rule number 3". Newcomers must be briefed on the rules and asked to agree to follow them. Remain open to revising the rules - include new rules to deal with disruptive behaviors, or delete rules that are not needed as the group gets comfortable with each other.

Job Aids

Discussed below are some additional practices that will help you lead a meeting more effectively.

Assistants: Ask for the following volunteers:

Note Taker: Takes minutes and records action items. This job can be rotated among participants, since the note taker has a hard time participating while focusing on the notes.

Time Keeper: Tracks the time limits on the agenda and Gives warning before the limit is exceeded (usually a one minute remaining signal).

Facilitator: Available to resolve disputes. This role Is often retained by the meeting leader, but can be delegated if disputes are common to keep the leader from taking sides. This person should have some expertise in dispute resolution and consensus building.

Sergeant of Arms: Someone to remind the group when the Rules of Engagement are being broken.

Software: Microsoft Word has an Agenda Wizard that enables you to prepare agendas in a standard format **and** take minutes by discussion item **and** record action items. The Agenda Wizard is located as follows:

- Select "File" on the toolbar
- Select "New"

- Select "Other Documents"
- Follow the steps in the wizard to create you agenda format and minutes.

You cannot get to the Agenda Wizard by selecting the New Document icon on the tool bar, or by using Control N.

Visual Aids:

Three easel sheets should be posted on the walls of your meeting room to help you manage meetings.

Parking Lot: The parking lot is a process to control issues that are "off the subject". These issues are "parked" for future discussion and resolution. Using the parking lot lets you stay on track, yet lets the participant see that their idea has been recorded.

Action Items: Action items should be recorded in the minutes and also on the easel sheet. The principle at work is to "keep things visible" so they don't get lost. Deadline can be established at the end of the meeting, when action items should be reviewed.

Jargon: When someone uses a term we don't know, we don't want to interrupt to ask for a definition. The jargon easel sheet allows the group to document the terms used that are not understood by all. This knowledge become valuable when subsequently making presentations, since your audience will likely have people who don't know all the terms used!

Summary & Critique:

Effective meeting leaders often use summary and critique to improve their meetings. Allow a few minutes on your agenda to summarize conclusions of your meeting, review action items, and critique the meeting. Participants will appreciate the closure that these activities bring to your meeting.

Follow-Up

Take a few minutes to review the items discussed in this workshop. Which ideas can you use at future meetings? Do you feel comfortable with both the concept and the practice of these techniques? Use your answers to these two questions to prepare an action plan,

What to do?	Who will do it?	When will it be done?	How will training be completed?

The End!