How to Conduct Effective Meetings

SAVIN Administrators spend a considerable amount of time in meetings, as both sponsors and participants. Consider for a moment meetings that you look forward to attending, versus meetings that you dread attending. The difference between the two can be summarized in "five Ps:"

1. **P**lanning that creates "buy-in" from participants and ensures that all advance and on-site logistics are adequately addressed.

2. **P**rocess that addresses advance, on-site and follow-on activities, and that ensures that the meeting is conducted in a professional manner.

3. **P**ersonality of a skilled facilitator to adhere to a clearly stated agenda, and engage all participants.

4. **P**articipants who can contribute to achieving the goal(s) of the meeting, and who are willing to assume responsibilities for any follow-on activities.

5. **P**roducts that result from the meeting prepared and disseminated in a timely manner.

Key Elements

Two elements for a successful meeting are to first determine if a meeting is needed; and next to have a clear agenda to guide both participant activities and the meeting process. Some guidelines to increase the effectiveness of your meetings include the following:

- Don't call a meeting unless there is business that *can't* be conducted by telephone and e-mail communications.

- Always have a concise meeting agenda that includes a clearly stated "meeting goal:"

  o It is helpful to seek input in advance from meeting participants about the goals and objectives to achieve their "buy-in." A meeting sponsor can also develop a "draft agenda" for circulation to participants to which they can add agenda items *prior to the meeting*.

- Determine in advance the meeting participants who are responsible for facilitating or contributing to each key issue (if applicable), and work with them to prepare their presentation within the time allotted. While you may have a "master facilitator," it's important to provide opportunities for participants to lead.

- Key components for the written agenda include:
  - "Header" that includes meeting sponsorship, date, time and location.
  - Welcome and introductions (a participant "icebreaker" is optional).
  - Goal(s) of the meeting.
  - "Old Business" (for meetings that are regularly scheduled).
  - Key issues to address or accomplish.
  - "New Business" (if there are any "loose ends").
  - Any "parking lot" issues (see "Meetings On-site Guidelines")
  - Clarification of any follow-on assignments or activities with deadlines ("next steps").
  - Adjourn.

- For a two-hour meeting, limit agenda items to *four key issues* with specified time limitations on each issue.

- Send the finalized meeting agenda that includes key topics, persons responsible for presentations and discussions, etc. with logistics (date, time {beginning and end of meeting], location and directions) *at least one week in advance of the session*. It is also helpful to remind participants to bring their calendars or PDAs for scheduling purposes.

Meeting Logistics

If key logistics are identified and addressed, it will increase the likelihood of a meeting running smoothly. Meeting facilitators should arrive at least 90 minutes prior to the meeting to attend to logistics, and to be prepared to greet any early participants without distractions.

- Seek to hold your meetings at a central location that is accessible by mass transit, has ample parking, and is disability accessible. It is helpful to provide the *full address* of the meeting venue (including zip code) so participants can easily go online to obtain directions and a map (or you can provide an online link with this information in your invitation).

- Set up the meeting room in a manner that is conducive to group discussion, i.e., a round table or horseshoe (*not* theater style).

- Provide signage in any hallways that clearly directs participants to the meeting location.

- Provide a sign-in sheet that documents who is attending the meeting.

- Arrange for audio/visual equipment, which may include:

  - Tear sheet pads and multiple colored felt pens.
  - Overhead projector or LCD equipment and screen and laptop computer (for any

presentation of goals or information relevant to the discussion, etc.).
- o Audio or video recording equipment (including adequate number of tapes and batteries).
- o Laptop computers to record notations from the discussion.

- Arrange for specific needs of participants, which may include

  - o Accommodations for persons with mobility access needs.
  - o Sign language interpreters for participants who are Deaf.
  - o Interpreters for participants who speak a language other than English.

- Arrange for on-site participant resources, which may include:

  - o Any written resources or handouts relevant to the discussion.
  - o Pads of paper.
  - o Pens or pencils.
  - o Sticky notes or index cards distributed on participant tables.
  - o Name tags.
  - o Name plates on card stock.
  - o Boxes of tissues.
  - o Refreshments (water and coffee at a minimum; if the group is conducted during lunch or dinner hours, a light buffet or boxed meal prior to the session is a good idea).
  - o Individual work sheets (if applicable).

Meetings On-site Guidelines

- Never penalize the people who arrive on time to meetings. Start promptly at the time designated on the agenda. End promptly on time as well.

- Keep to the agenda in order to respect participants' time and commitment:

  - o Include a "parking lot" for meeting participants on a piece of tear sheet posted on a wall. Provide each participant with "sticky notes" to jot down issues they think about – which may or may not be related to the topic at hand – and post them on the "parking lot." Allow at least 15 minutes at the end of a meeting to address "parking lot" issues, if needed.

- Designate a staff member or volunteer to document the meeting through minutes. It is also helpful to have a "recorder" who documents key issues on tear sheets posted on the walls.

- It is a good idea to have individual work sheets for key issues so that *all* participants can provide their input. This is a good process to engage participants who are less likely to

participate verbally, and also to obtain additional data that can address the key issues of the meeting. The facilitator can describe the type of information that is sought; provide a time limit for completing the work sheet; collect the work sheets; and assure participants that their input will be reflected in the meeting's minutes.

- Document proceedings of meetings through minutes that are distributed to participants *within one week* of the meeting. Either highlight "action items" or include a list at the end of the minutes, with assignments and deadlines for persons who are responsible for each action item and specific deadlines.

Conducting the Meeting

A well-managed meeting always has a designated facilitator or leader. This person should be at the site at least 90 minutes in advance of the meeting to set up the room and welcome participants. Effective meeting facilitation includes:

- Welcome from the sponsor and/or facilitator, and an opportunity for participants to introduce themselves by name and agency affiliation.

- "Housekeeping announcements" (such as where bathrooms are located, information about any reimbursements, etc.)

- If time permits, an "icebreaker" that immediately engages participants. For example:

  o "From the agenda we sent you in advance, I'd like each of you to identify one expectation you have of this meeting."

  o "From the agenda we sent you in advance, I'd like each of you to identify one challenge to accomplishing our goal(s)."

- Review of the agenda, with an opportunity for clarification if needed.

- Ask participants to contribute to general "ground roles" that encourage full participation and eliminate any possible distractions to the business at hand (see "Sample Ground Rules" provided by the Project that can be used to "fill in the blanks" of ground rules established by participants).

- Providing time prior to the end of the meeting for summary, clarification and thanking the participants.

Follow-on to the Meeting

It is critical to prepare written minutes as soon as possible for dissemination to participants. Too often, a meeting ends with little or no follow-on, which makes participants wonder "what happened?", "what are the results?" and "was this meeting worth my time?"

Meeting minutes essentially follow the "outline" of the agenda, and clearly summarize "action items" with individual responsibility and deadlines. It is the responsibility of the meeting host or facilitator to remind volunteers of their commitment to follow-on activities.

Useful Tips for Meeting Facilitators

- In your brief welcoming remarks, attempt to make people feel that you are glad they came, and that their contributions are important.

- Speak slowly and clearly.

- Maintain a positive and friendly demeanor, which is contagious!

- Make the first introduction of yourself (in order to model the type and brevity of the introductions of other participants).

- Provide clear time limits for each agenda item to make the best use of limited time.

- Try to involve all participants in the discussion, and avoid letting any one participant dominate. Comments like, "We haven't heard from (name) yet on this topic; do you have any ideas you'd like to share?" and "thanks for that insight, why don't we let the others respond" are helpful to accomplish this goal.

- Briefly summarize and provide opportunities for clarification of group discussions following each agenda item.

- Document any "action items" on tear sheets, in the meetings' minutes, and verbally to participants to clarify individuals' responsibilities for follow-on activities.

- Discuss plans for any future meetings.

- Thank people for attending, and for their contributions to the meeting's success. Follow-up with a brief email that offers your gratitude in writing.

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