

A Brief Guide to Effective Meetings

The Overlapping Purposes of Meetings

- Share Information (Inform)
- Persuade (Influence)
- Discuss (Align)
- Generate Ideas (Brainstorm)
- Identify Problems and Challenges (Diagnose)
- Create Solutions (Solve)
- Make Decisions (Deliberate)
- Produce a Product (Work)
- Check In, Celebrate (Build Community)

Types of Meetings

- Committee
- Work Group, Task Force
- Unit or Staff Meeting
- Special Called Meeting

Meeting Participants and Roles

Given the goals of the meeting, who needs to be included, and why?

What is the ideal size? Beyond eight is potentially problematic for several reasons related to group dynamics. If the group is larger, can it be split into subgroups/meetings? Consider inviting particular participants for just the portion of the meeting relevant to their participation rather than the entire meeting.

What is the unique contribution of each member? Frequently individuals are included in meeting simply due to their title or position. Can some potential members simply be 1) consulted for input prior to the meeting, rather than attend, and/or 2) kept apprised of the meeting outcomes rather than attend?

Who might be the most effective leader/facilitator for the meeting, regardless of official title or who convened the meeting?

Consider assigning specific roles depending on the goals of the meeting. For example, 1) time keeper, 2) person to solicit input from members who are relatively quiet, 3) official skeptic or devil's advocate, 4) person to represent the voice of a group not otherwise represented by one or more meeting participants, etc.

Ensure that someone is responsible for taking notes in real time.

Meeting Length and Setting

Is there good reason for adopting the standard 60-minute length? Research shows that people tend to fill the allotted time, regardless of productivity. Up to a point, shorter meetings are equally productive as hour-long ones. Conversely, meetings to fully discuss and explore important or complex issues may require more than 60 minutes.

Consider starting at 10 or 15 minutes after the hour to shorten the meeting and allow participants to attend on time, ready to engage.

Sitting promotes a particular set of behaviors in meetings that may not be conducive to engagement and efficiency. Consider the advantages of briefer, standing meetings. Is the group small enough to engage in a walking meeting?

Consider seating arrangements. People gravitate to their habitual place in the room, yet such factors as who participants sit next to, across from, and their distance from the meeting leader have been shown to affect behavior. Consider randomly or strategically assigning people to seats.

Meeting Culture & Norms

Make explicit the expectations regarding behavior and how participants interact with one another. For example, what is the policy on using electronics such as phones, laptops, and tablets? Are we committed to starting and ending on time? When people arrive late, what is the protocol (e.g., do we recap as a group, ask one person to recap quietly while the group continues, or continue from where we are?). What are legitimate reasons for canceling a meeting or missing the meeting, and are absentees expected to notify the leader in advance? What is the level of confidentiality?

Examples of norms to consider making explicit, or asking for agreement on:

- We critically challenge ideas but do not criticize people.
- We are respectful not to interrupt or talk over each other.
- We will refrain from side chatting during the meeting.
- We hold each other accountable for being respectful, staying on task, etc.
- We reserve the last 5 minutes for providing feedback on group/meeting process.

Meeting Agendas

There is frequently the assumption that having a printed agenda promotes productivity, although research has shown no such relationship to simply having an explicit agenda. Definitely avoid stale, reprinted-from-one-meeting-to-the-next agenda templates.

Actively solicit agenda items from participants prior to the meeting. Send the initial draft agenda out at that time to communicate what has been included already.

Assigned amounts of time for each agenda item have their time and place but are not a necessary ingredient for an effective meeting. Consider carefully how and when to use specified time allotments for each agenda item.

Plan the agenda carefully, scheduling the most important items first. The exception might be something brief and positive to start, such as a celebratory announcement.

For agenda items that do not have an assigned person by nature of the item itself, consider assigning a meeting participant to be responsible for facilitating that portion of the meeting. Such variety promotes engagement by all meeting participants, and especially the member who facilitates.

Consider an agenda format that includes notes on who is responsible for each item, the process involved in addressing it during the meeting (e.g., presentation, discussion, decisions, voting), and any preparation expected of participants prior to the meeting.

Start the meeting with a brief overview of the agenda and solicit suggestions for changes. Consider going around the room and asking each person to share what he or she hopes to contribute to the meeting.

Setting the Tone

Emotions are contagious. Greet participants individually as they arrive, demonstrating a positive demeanor, and giving them your full attention.

Create a separation between what occurred prior to entering the meeting and the meeting setting. For example, have music playing as participants arrive, invite participants to join in a centering activity to focus their attention at the start of the meeting, start with something humorous/positive, etc.

Consistently model active listening and the types of positive behaviors you wish to promote in others. Verbally and nonverbally acknowledge and reinforce productive behaviors by participants.

Format

What is the best format given the goals of the meeting? Perhaps different formats apply to specific segments of the meeting. For official decisions, a more formal format, such as Robert's Rules of Order, may be most appropriate. For idea generation, assigning time for quiet, individual reflection and note taking is recommended prior to group discussion.

For brainstorming or problem solving portions of the meeting, have the group list words that tend to shut down further consideration or creativity. Write them out on a poster. Assign a referee, and during the discussion, each time a person uses one of those words, he or she has to put a token in the jar. The winner is the person who has most tokens remaining in front of them.

Similarly, at the start of a discussion, announce a policy of no use of the word "but." Instead, use the word "and" or the phrase "and I wonder . . ." Consider assigning a referee to call "infractions," sounding a bike horn or throwing a penalty flag.

If there is information that is vital for each participant to have prior to discussion or decision making, consider taking time for silent individual reading.

For discussions, consider starting with participants engaging in brief, timed pair discussion prior to the whole-group discussion. If the discussion or idea generation prematurely stalls, consider having participants change seats, perhaps after standing and stretching or walking around the room.

Decision Rights

For each potential decision, clarify who holds decision rights: Leader (with or without input from the group) or the group (with or without input from those outside the group). For group decisions, is the requirement simple majority vote or unanimity? Regardless of the voting threshold, is there value in further discussion after the vote to build further buy-in from the dissenting individuals? Perhaps include discussion of the importance of working toward shared goals, regardless of whether each meeting participant voted with the majority or the minority.

Following Up

Before concluding the meeting, summarize the key decisions and actions generated during the meeting. Clarify what specifically are the messages to take from the meeting and share with constituents and stakeholders.

Collectively and explicitly note who should receive communication about the meeting outcomes, and who will provide that communication.

Create notes or minutes as soon as possible and distribute them immediately. Highlight action items and who specifically is responsible for each.

Regularly solicit feedback about meeting process and logistics. Promote a spirit of continuous quality improvement with regard to the ways meetings are conducted. Show appreciation for candid feedback.