Best Practices for Effective Meetings

This article highlights the components required for running effective meetings. It shares practical tips on how to clarify the purpose of a meeting and create an actionable agenda with time allocations. It's a great reminder of the importance of agreeing on ground rules, assigning key meeting roles and creating a visual record of the main points decided during the meeting. Finally ensure you are hitting the mark by evaluating the effectiveness of your meetings.

Clarifying Aims and Purposes

Meeting aims or purposes should be at the top of every agenda. These are the key decisions that must be made or actions that must occur at the meeting. If you aren't clear on aims and purposes, don't meet.

Everything else on the agenda-topics, times, presenters, are the activities that, taken together, will accomplish the aims.

One way to clarify aims is to ask oneself, "Imagine the meeting is over. What do I hope will have happened?" When the agenda activities and time allocations have been decided, ask "If we complete these agenda activities, will we have accomplished our overall aims? Additions or adjustments in the agenda may be required.

Creating an Actionable Agenda

The agenda is the framework that supports the meeting. Agendas have been compared to road maps, blueprints, flight plans, and recipes. These all suggest that the agenda helps a group achieve a desired outcome. Each item on the agenda should begin with an action word (verb) and should frame the expectations of attendees.

Although the committee chair or group leader usually has the final say on the agenda, it should be created with at least some input from other members. A leader can solicit input by doing the following:

- Create a subcommittee of two or three people to help the chair plan agendas
- Spend time at the end of each meeting identifying key issues for the next agenda
- Send out a call for agenda items before the meeting

By involving the membership in agenda creation the leaders can help ensure that the group addresses issues that the leader might not be aware of.

Adapted from:
https://www.ohrd.wisc.edu/AcademicLeadershipSupport/LeadMeetings/tabid/74/Default.aspx

Allotting Time for Topics

The meeting agenda should allot specific amounts of time for each item. If no times are specified, then everything on the agenda appears to be of equal importance. An unfortunate consequence is that too much time will be spent on the least important items.

Allot time for meeting topics based on their significance. Agenda items are like work in general -- they will expand to fill whatever time is available.

To allot time most productively consider some of these strategies:

- Identify the number of people likely to attend. Then estimate the total amount of time required if everyone made one 30-second comment. This is the minimal amount of time you'll need.
- For each agenda item identify activities that will be required (presentations, review of documents, voting, prioritizing, etc.) and factor these into the total time needed for each item.
- Consider the likely level of agreement for each agenda item. Where there is wide disagreement over certain topics, allow more time for these times.

Tip: Going around the table and inviting everyone to make an announcement is generally not a wise use of collective time. Participants may feel pressure to say something regardless of how important the item may be.

Getting Started on Time

Get into the practice of consistently starting each meeting on time. Leaders who wait to start meetings until more people arrive usually end up wasting a lot of professional time which adds up over the course of a year. It may require a change in the culture, but once people know that you start your meetings on time, they will learn to arrive on time.

Here are a few strategies that can help get your meeting started on time.

- Set a stop watch to go off at the time the meeting is to start. This reminds everyone of the time and may help.
- If the committee or group is not accustomed to starting on time, give fair warning ahead that you will start the meeting on time by either including it on the agenda or as a separate communication.
- Some groups schedule 15 minutes of time to socialize before the start of the meeting.

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Ending on Time

Well planned and organized meetings normally end on time. However, if most of your meetings tend to run-over, it's important to understand why. Some reasons might include:

- Meeting time has not been managed well throughout the meeting
- Priority items were not dealt with first
- The group went off-topic too many times
- Meeting planners underestimated deliberation time required
- Too many items were planned for the time available
- The group has a history of going beyond its stated adjournment time

Here are a few strategies that can help you end your meetings on time.

- Start the meeting on time. It's a lot easier to end on time if the meeting begins on time
- Appoint a timekeeper to help you. The timekeeper gives continuous feedback to the group regarding the use of allotted time for each agenda item
- If you are chair and wish to extend a meeting another 15 minutes to half an hour, ask the group if they are willing to remain to finish the task at hand
- In planning a meeting make sure it has a stated end time. If attending a meeting that does not state an adjournment time, bring it to the leader's attention at the beginning of the meeting
- Keep track of your own meetings - Do most end on time? Be clear that it is your aim to end at the appointed time

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Agree on Ground Rules

Ground rules are agreements about expected behaviour in meetings. The purpose of ground rules is to make explicit the group's norms about how team members will interact, thus preventing or reducing misunderstandings and disagreements. Ground rules may differ greatly by department, committee or group, but they should always contribute to the group's ability to work together effectively.

Each group creates its own ground rules. All groups violate their own ground rules sometimes, and it is the chair's or facilitator's role to remind the group. Keep the ground rules close by. It's important that ground rules represent a consensus and are agreed upon by the entire group. They should be reviewed and updated periodically.

Some common ground rules are:

- Turn off cell phones
- Treat other members with respect, even in the face of disagreement
- Send a substitute if you cannot attend

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- Bring a handout when you are making a proposal for action
- Arrive on time

Another type of ground rule is agreeing in advance how decisions will be made. The most common ways that decisions are made in committees or groups are through majority rule (voting) or consensus. Both methods have their strengths and limitations. Voting is expeditious, although a simple majority may not bode well for implementation. Consensus may take longer to achieve, but can create high levels of support for implementation. A group is considered here to have reached consensus when it finally agrees on a choice and each group member can say:

- "I believe that others understand my point of view"
- "I believe I understand others' points of view"
- "Whether or not I prefer this decision, I support it (and will not undermine it) because it was arrived at openly and fairly and is the best solution for this committee or group at this time."

It is important to have agreement within any committee or working group on how decisions will be made whether by voting or consensus or some combination. This can avoid disputes later about whether or not important decisions were made properly.

Assigning Key Meeting Roles

Most meetings need people playing **four roles**:

- Leader convenes the meeting
- Facilitator keeps discussion and decision-making process moving along
- Recorder takes notes on paper, laptop or on flip charts
- Timekeeper reminds leader when time almost up for a given item

Make sure these roles are assigned prior to a meeting

Leader role - The leader convenes the meeting and takes responsibility for communication before and after. The leader may lead discussion on all items or may ask others, including a facilitator, to lead all or parts of the meeting. This enables the leader to be a full participant in discussions.

Facilitator role - The facilitator keeps the discussion and decision-making process moving along. The facilitator takes responsibility for the process, but should not be involved in the content of the meeting. A facilitator is especially useful if the leader holds a very strong opinion on an agenda item. Having a facilitator enables the leader to be a full participant.

Recorder role - The recorder takes notes on paper, laptop or on flip charts. Meeting notes should be distributed as soon after the meeting as possible. The longer the lag, the less confidence the members have that their investment will result in action. For groups that meet regularly, the recorder is responsible for keeping previous meeting notes and agendas in one place where they can be referenced later, such as through a shared network drive or a notebook, etc.

Timekeeper - The timekeeper reminds leader when time almost up for a given item. A stop watch or small clock is invaluable.

Creating a Visual Record

A visual record is an outline of key discussion items or alternative solutions which are placed on a flip chart or projected from a laptop for all to see. This visual representation helps people remember what has been posed and enables the group's attention to focus on the items, rather than the person who suggested them. The visual record also discourages rehashing.

Here are some guidelines for using a flipchart to create visual records:

- Write big so that people can see it
- Use dark colors like black or deep purple. Red does not show up well
- Use markers that do not have a headache-producing odor

If people want to add a thought or example to an item and there is no room on the paper, use a 3x5 self-stick note to capture the thought. Stick the note by the item.

Here are some guidelines for using a laptop and projector:

- Use a large font, preferably 18 points or higher
- Adjust the lights and shades in the room to be sure that people can see it
- Print out copies of the records for people to take with them

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Evaluating your Meetings Periodically

Since meetings consume so much of our time, it's worth trying to improve them. The leader's perception of how a meeting has gone can be quite different than participants' experiences of the same meeting. Evaluating how meetings are going, discussing results together, and making improvements are a powerful way to use people's time wisely and respectfully.

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You can evaluate the meeting yourself or ask members to evaluate it. Evaluation can be an informal question such as, "Do you feel like we accomplished what we needed to today? Other questions from which the leader might select include:

- Are we starting on time? Ending on time?
- Are we staying on topic?
- Are all our members participating in discussions and decision-making?
- Are we addressing the most important issues in our meetings?
- Do we follow through on our decisions?

The group as a whole should generate solutions for any items that received a "No" response.

Brief paper surveys are another option and the group results should be aggregated and shared. Focus on any weak spots identified in the evaluation at the next meetings.

Another approach is to ask, "What went well at this meeting (or recent meetings)? Why did it go so well? What can we do to make all our meetings this effective?"

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