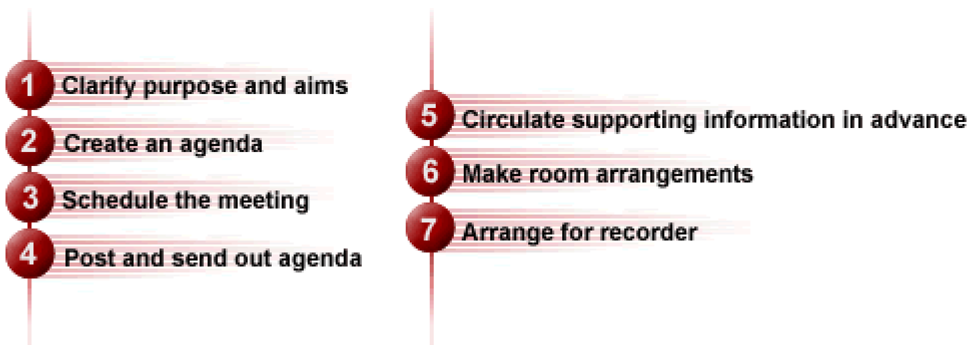
Steps to Leading an Effective Meeting

What to do Before a Meeting

Although it may vary by department or unit, there are seven key responsibilities expected of meeting facilitators or leaders before a meeting takes place. Each is explained below.



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1. Clarify purpose

A clearly stated purpose describes the key decisions that must be made or actions that must occur at the meeting. The purpose of a meeting should be stated at the top of the meeting agenda.

Some **example purpose statements** include:

- Share best practices in employee engagement and identify opportunities to work collaboratively
- Identify priority goals for next year
- Examine and update performance expectations
- Decide how to get feedback from staff

Everything else on the agenda including topics, times, and presenters are the activities that, taken together, will accomplish the purpose or aims. A weekly or monthly staff meeting may not require meeting aims beyond the agenda items.

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2. Create an agenda

An agenda is a framework that guides and supports the meeting. Agendas are like roadmaps, blueprints, flight plans, and recipes. An agenda helps focus the group's work toward achieving desired outcomes. Good agenda items provide focus and structure for a meeting.

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

Some **example agenda items** include:

- Report on employee engagement activities
- Identify members for review committee
- Generate list of possible solutions for the xyz problem with pros and cons of each

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3. Schedule the meeting

Scheduling a meeting involves much more than just making a list of attendees. It requires identifying key people who *must* attend and either finding times that work for them or notifying them of the meeting's time and location. Once an optimal date and time are agreed upon, a meeting location can be selected. (Choice meeting locations sometimes dictate meeting dates.)

Other scheduling activities might include:

- Create an electronic mailing list at the start
- Keep a sample email handy to use as a template
- Draft the final meeting notification with date, time and location

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4. Post and send out agenda

An agenda should be sent to participants ahead of time to help them prepare to participate. The meeting notice and/or agenda should specify if attendees are required to bring specific information.

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5. Circulate supporting information

You should always circulate supporting materials to participants in advance of the meeting. However, deciding how much information to send in advance can present a conundrum. Some people won't look at anything prior to the meeting and some will conscientiously read all the supporting information they can. Here are some things to consider when deciding what and how much to send out ahead of time:

1. Do provide enough information before the meeting so people arrive with a general familiarity and framework of the issues to be discussed. Don't assume that everyone wants or needs his or her own copy of large reports.

2. Do provide the web site URL or the link to a shared drive instead of paper documents where possible. Don't send documents/materials without some explanation of how they relate to the agenda (if this is not clear from the agenda).

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3. Do extract information in a succinct outline or summary whenever possible to make it easier for members to read and absorb the information. Don't send anything that is so complex or technical that it requires someone to interpret it. Hand that out at the meeting (or parts of it) and explain what it means.

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6. Make room arrangements

Ensure that room arrangements are made. Room arrangements can make a big difference in how well a meeting goes or doesn't go. Most important is that participants can see and hear each other.

Although a "U" shape arrangement or open square is ideal for smaller groups of 20 or less, it is not usually a good choice for larger groups. A herring bone arrangement of tables is usually better for these larger groups.

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7. Arrange for recorder

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 from a notebook or shared network drive, etc.

What to do During a Meeting

The meeting facilitator or leader can make a huge difference in a group's productivity. These ten meeting facilitator actions can maximize the group's time and productivity. Each is explained in more detail below.

1. Start on time
2. Ensure a quorum
3. Review agenda
4. Keep discussion focused
5. Encourage participation
6. Help group come to decisions
7. Summarize decisions
8. Agree on action plan
9. Draft agenda for next meeting(s)
10. Evaluate meeting

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1. Start meeting on time

Start the meeting promptly on schedule and do not wait for others to arrive. A large amount of professional time is wasted by leaders who wait for more people to arrive before starting a meeting. It may require a change in the culture, but once people know that you start your meetings on time, they will arrive on time.

Tip: Some groups even schedule 15 minutes of time to socialize before the start of the meeting.

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2. Ensure quorum

Under Robert's Rules of Order, a quorum is the number of members entitled to vote who must be present in order that business can be legally transacted. The quorum is usually the majority of the members unless a different quorum is decided upon.

For less formal meetings or groups that have agreed to not require Robert's Rules of Order, generally do not need a quorum in order to precede and make decisions.

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3. Review agenda

Always briefly review the agenda including the aims and purposes as the meeting gets started. This helps participants focus their attention and understand what will be required

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of them. Many of us attend meetings one after the other, so it's helpful when the chair provides this opener to focus the group.

In reviewing the agenda, the chair should make it clear what decisions must be made or actions must be taken. The chair or facilitator may choose to invite additional agenda items at the start of the meeting.

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4. Keep discussion focused

Focus on agenda items. Even if these items are clearly listed and emphasized, creative, intelligent and committed people may stray from the topic. To get a runaway meeting back on track, the chair can say, "We are getting off topic and need to move back to XYZ." Then he or she repeats the topic, issues or question again.

Some groups maintain a "parking lot" on a separate piece of paper for important issues that come up but are not directly related to the discussion. The "parking lot" can be consulted for agenda planning for succeeding meetings.

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5. Encourage participation

Effective meetings are participatory and good leaders try to get everyone involved. Some ways to encourage full participation include:

- Begin the meeting with a question that everyone can answer and go round-robin. The question might be, "What are your hopes for this team’s work?"
- When asking for solutions/ideas, go round-robin at least once so everyone has a chance to offer an opinion
- On a flip chart or projected from a laptop, keep a list of ideas/opinions being generated so people can see their ideas in front of the group
- When brainstorming, ensure that ideas/suggestions are not critiqued as they are offered. Get all the ideas on the table before critiquing.

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6. Help group come to decisions

Be clear before the discussion begins how the final decision will be made – voting, consensus, or if the leader will decide after getting input. A group reaches 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."

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7. Summarize decisions

When a group seems to have come to a consensus or decision, restate and summarize what the final decision(s) is. This helps to ensure that all members hear the same thing. Clarification at this point can prevent problems later.

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8. Agree on action plan

An action plan outlines the specifics that must be done. Not every goal needs an action plan, but for goals that involve more than one person, it's usually helpful to be specific about who will do what by when.

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9. Draft agenda for next meeting

Ask for agenda items for the next meeting from the floor or ask a small group of 2 or 3 members to work on creating agendas. People are more likely to participate in a meeting if they have had some input into building the agenda. Even if every item suggested cannot be dealt with in a meeting, look for ways to provide information via handouts, E-mail, or creating connections with others.

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10. Evaluate meeting

Before the meeting adjourns, try to do a brief evaluation. Ask some informal questions such as, "Do you feel like we accomplished what we needed to today? Did everyone participate?" The meeting leader can ask the questions with group members answering in turn, round-robin style, or the questions can be asked for anyone to answer.

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.

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What to do After a Meeting

Don't assume that ideas discussed during a meeting will be put into action or even remembered. To ensure follow-through and accountability a meeting leader needs to do three key tasks after the meeting ends. These are discussed in detail below.

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1. Distribute minutes

Ensure that minutes are produced and promptly distributed to all attendees including guests. Meeting minutes don't need to include everything everyone said. They do need to include following:

- Date, time location
- Attendees
- Key points raised and decisions made
- Motions and voting results if votes taken
- Who is responsible for what follow-up action and by when

Most word processing software includes templates for agendas and minutes.

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2. Archive meeting documents

All meeting documents including the agenda, minutes and supporting documents should be kept together and archived. These records can be checked when questions arise about past decisions or actions. It is discouraging to committee or group members to rehash prior discussions or decisions because of poor record keeping.

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3. Check on action

Often people need a gentle nudge to remind them about completing action items. Leaders need to check to ensure that action is taking place as agreed. The check can be an email or phone call to the point person or a meeting devoted to checking on progress. Not checking may send a message that not much action is really expected.

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