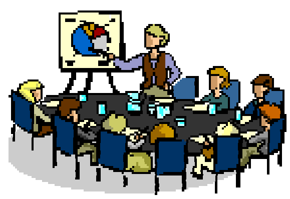
Resource Guide
For
Effective Meetings



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Contents

Agendas

Agendas are guides to managing a meeting, focusing energy, providing structure, or simply demonstrate planning. They are part of the norms a team should have to be effective in reaching their goals (Levi, 2001). They serve as a tangible piece of evidence that the participants have direction to go or tasks to discuss. They vary in complexity to simple bulleted items to complex tracking documents that are connected to project management software. Regardless of the appearance, format or even presence of a document, agendas are powerful tools in driving a meeting, task or project.

For the purpose of this assignment relating to meetings, this outline will focus on agendas as a document with written information used to guide a meeting.

Format and Communication

- *Format*   The format must be based on the audience and what is needed to be accomplished. If the meeting is a simple informational meeting then often the agenda is a list of dates and details (if this is the case, consider an informational letter rather than an actual meeting). The more complex the task or project, the more detailed the agenda needs to be.
    - *What details to include*   Take careful consideration of the order and items placed on the agenda. Usually there is a section of standing or regular items. This might include calendar review or passing of the previous meetings minutes. It is then appropriate to review old items. Here, team members

report out progress made on tasks. This section might also include discussion of future tasks. The next section would be new items where the team members discuss new items.

  - *Discussion versus action items* Each of the items on the agenda should be discussed, or remove them from the agenda. Items can be tabled or moved to another meeting date. Some items are just issues to be discussed; other items require action or a decision to be made.

- *Distributing the agenda* It is best to send out the agenda one to two weeks prior to the meeting. This is also dependant on the frequency of the meeting, size of the group and relationship of the team. In today's digital world, most agenda's are emailed as attachments for the team members to read, print or sync to their PDAs. Often, the team leader will provide additional copies at the time of the meeting. However, if the leader is always providing copies, some members will simply not be prepared since they will rely on the leader to provide one.

Included items

What is included in an agenda are self explanatory as in the bulleted list below. Microsoft Word has built into its program an Agenda Wizard with different styles and formats to assist in the development of the agenda document. There are more samples in the MS webpage to download additional examples and templates. It is a terrific resource for meeting facilitator with limited agenda experiences.

- Date
- Time
- Location
- Who needs to attend
- What to bring
- What to read prior to the meeting
- Items to be discussed and decided
- A way to introduce new items for current or future discussions
- Space for notes
- Next meeting date, time and location

Accountability

Agendas can be used effectively as accountability tools. In more complex task driven teams, the agenda is also a place to record which members will follow up on key tasks or discussion items. The meeting minutes should reflect the agenda items and record decisions made and who is responsible for what. The agenda document can be formatted to prompt and record that information.

Other Resources

http://www.3m.com/meetingnetwork/readingroom/meetingguide_building.html

http://www.mpiweb.org/chapters/home/ldtoolkit.asp

http://www.mpiweb.org/chapters/home/ptk/How%20to%20Build%20an%20Agenda.doc

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The Setting Components for Meetings

Partnerships require a new look in this rapidly changing society that is moving from knowledge-based functioning to “emergent systems”. To create effective organizational dynamics several relationship features need to be adapted. Models of group development emphasize that “groups, including groups seeking to become teams, go through series of challenges” (Jones and Bearley, 4). Synergy, as a goal, includes collaboration, shared decisions, and camaraderie (Harvey, Bearley, Corkrum, 265). Rapid changes demand settings and environments where can teams meet, relate, and work toward achieving the goals.

The organizational environment is the atmosphere that evolves from the way the organization conducts its business. The environment as it impacts team work (LaFasto and Larson, 157-158) has no particular location; is pervasive; and, requires that people spend some face-to-face time together. Meeting time must be planned and expected because it brings people together in ways that builds trust by scheduling co-location in one building; one room, or connect in person on a regular basis (LaFasto and Larson 180-181).

A meeting leader’s second most important role is to ensure that information is not only shared by the group but that it is understood and processed in a supportive and participative environment (Levi, 68). Technology, and in particular electronic communication systems, provides unique ways for groups to meet and interact. They are free from the previous limitations of time and place (Levi 271). Information Technology opens new meeting formats (Levi 272) including: STSP (same time, same place); STDP (same time, different place); DTSP (different time, same place); DTDP (different time, different place).

“Different types of teams have different communication needs…electronic communication allows project teams to form without regard to place.” Dispersed project teams rely on the technology for communication and benefit from the crucial skills of varied members of the team (Levi, 282).

Inclusive meetings attended by all staff members prevent dividing lines, particularly those along lines of educational background, and a “we-them” atmosphere (Shoemaker, 63). Successful workshops that bring about change result from staff readiness and motivation for what is to come. The setting for a workshop should be considered in relation to its objectives. If the content is curriculum related or use of children’s materials an actual classroom setting provides reference points for the session. “When adult problem solving is the goal…it may be more productive to be in a setting where participants can sit in adult-sized chairs and where visual and sound distractions are limited” (Caruso, 205).

Morale - comfort builders include adding food to a work session or staff meeting because it services as a catalyst for informal talk and relaxation. Another way to build the staff morale is to vary meeting locations. A new location creates a change of pace and may be particularly helpful when an extra meeting is scheduled. Residences or restaurants allow exploring issues away from the environments where they may have been initiated (Caruso, 212).

Leadership groups that address morale building and consider appropriate setting generally hold themselves accountable. Successful companies have “an ingrained performance ethics that enable teams to form ‘organically’ whenever there is a clear performance challenge requiring collective rather than individual effort" (Katzenbach and Smith, 116). Teams can maximize performance by carefully constructing performance-focus management strategies. Team members need to spend "a lot of time together, scheduled and unscheduled, especially in the beginning "encouraging greater creative insights and personal bonding (Katzenbach and Smith, 119). Team performance depends on the established rules of behavior. "The most critical initial rules pertain to attendance." This says no phone call and no interruptions allowed ensuring that discussion flows.

Rapid society changes create expectations for meeting settings. A leader may generally project an image through voice, dress, body language as well as the office location and furniture. These familiar and traditional visual and auditory cues are less apparent in virtual environments. Telepresence (Zigurs, 344) can be successful when the telecommunication medium produces a right environment for the senses. This means having a range of sensory input (voice, video, and touch). This should be paired with interactivity which is the degree to which users can influence telecommunications medium form and content. Research indicated that frequent communication is more important in virtual than traditional teams. This encompasses than just emailing but rather the leader creating their telepresence (Zigurs, 344).

Team building means beginning face to face situations to establish foundations for relationships (348). *Board Meeting Etiquette* expands with *Conference Call Etiquette* as meeting facilitators embrace changes to program successful meeting settings.

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The Processes for an Effective Meeting

Effective group processes are an important key to an effective meeting. For this segment, three items will be discussed: the roles of lead individuals at the meeting, the ways to guide discussions and decisions, and the group dynamics that a skilled facilitator will manage.

Team Member Roles at a Meeting

There are many different roles and job duties that theorists discuss in terms of managing effective meetings, but four major roles appear in the literature again and again. These should be an on-going part of the team or appointed at the beginning of the meeting. First, the leader is the person in charge of the meeting. Second, the facilitator is the person who facilitates the smooth operation of the meeting processes. This can be a person from outside the organization or someone from within. It may be the boss or leader who called the meeting. The key point is that the facilitator must be the "neutral servant of the team" (Harvey 1997, 264). The facilitator encourages everyone to participate, protects individuals, and helps the group find win-win solutions. Kaner says that "the facilitator's job is to support everyone to do their best thinking" (1996, 32). According to Schwartz (2002, 41), the facilitator must lead the discussion without sharing his or her opinion or influencing the discussion. It is therefore difficult for the leader to be the facilitator. The leader may not wish to give up partisanship to be the facilitator, but at the least he or she needs to be aware of the processes for a smooth meeting. The group processes which are managed by the facilitator or leader are discussed in more detail below.

In terms of other group roles, the group members play their part and should be aware of the operational processes of the team. Additional roles include the recorder, who records on paper, on a computer, or on chart paper for all to see; and the time keeper, who keeps the group on task time-wise and is especially important if there is a timed agenda (see Harvey et al., 1997, 263 for a discussion of these roles).

The Discussion Process and Decision Making Process

Many books and articles have been written on the processes the facilitator can use to elicit and manage discussion and decision making in a meeting. Here a few often-used techniques are summarized.

Stacking is a method of calling on several people who wish to speak, giving them an order in which to reply ("Jane, George next, and then Kathy"). The leader or facilitator leads the discussion and "stacks" those with raised hands by letting everyone know who will be speaking in what order, ensuring that all who wish have an opportunity to speak and eliminating the need for constantly raised hands. It is important for the facilitator not to forget the order and not to let others interrupt the discussion. A good facilitator uses stacking to ensure that people feel they have equal opportunity to contribute (Kaner, 1996, 49).

Structured go-arounds are another technique to facilitate discussion. The leader or facilitator lets everyone comment on the issue by going around the table or around the room. Sometimes each is limited to one comment or thought per round. Each may choose to pass if he or she wishes or may ditto a comment. When the last person has commented, the group may work around the room again in a backwards direction, with the last speaking first. This is an excellent opportunity for everyone to have a chance to comment, not just the usual parties. (Kaner, 1996, 78-79).

Turning to another technique in the gathering of group opinion, the group members may record individual thoughts on index cards. There are several reported methods to record and collect the feedback, but the idea is to use everyone's thoughts to formulate or edit a plan or ideas. The notes may be shared directly at the meeting or kept to be reviewed by the leader or a task force before the next meeting. This method ensures that everyone's thoughts are shared and not discounted by aggressive group members.

Levi (2001, 156) shares three approaches that can be used in group decision making. In the consultative approach, one person has the authority to make the decision. This may be the leader of the group, but the decision maker may not even be a member of the group if the group is an advisory committee to a higher authority. In the democratic approach, the group votes, usually guided by its bylaws or charter as to what plurality is needed for a vole. In the consensus approach, the group works for consensus, in which all either agree with the group decision or can live with it. While this approach is recommended by Levi (2001,158), who states that consensus decisions have a greater likelihood of being implemented by the team, there can be problems if conflict is seen as a negative and avoided or if issues are glossed over (Lencioni, 2002, 207)

The Group Dynamics

Group dynamics play an important part of the effective meeting process, and good facilitation is the key. The team leader or facilitator must ensure a collaborative climate and keep communication safe and open (LaFasto and Larson, 2001, 109). Much research has been done in this area.

Schutz (1958) did work in group development and proposed that groups develop in sequential stages, with the first stage being one of inclusion, where group members are either in or out. The second stage occurs around control, with members either being at the top (up, in power), or at the bottom (down, out of power). The skilled facilitator works with groups to be more inclusive and to distribute power within the group. It means being aware, observant and proactive to effect good communication within the group.

Team members need to trust each other, to be able to engage in conflict and to make commitments to reach goals (Lencioni, 2002). This requires more than task completion; teams need team building activities led by a skilled facilitator.

Jones and Bearley (1986) proposed a matrix of group development involving task behaviors and relationship behavior in a group. With task behaviors as the horizon axis and relationship behavior on the vertical axis, they suggested that both elements develop in a group together and influence the group along a continuum. Under this proposal the role of the facilitator becomes even more key to managing group members and developing the group as it performs tasks and builds relationships.

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Team Building
The Theory Behind the Activity Process

Teams develop through a series of stages that reflect change in their internal group processes and the demands of their tasks. There are several issues that a team should address when it is first formed so as to become more effective. The team needs to orient or socialize new members into the group. This socialization process assimilates the new members while accommodating their individual needs. There are techniques to help teams form social relations, develop team, norms, and clarify the definitions of their tasks. (Levi, 2001)

There are a variety of stage theories of group development, yet most have similar elements. Tuckman and Jensen (1977) developed a theory focused on the development of the internal relations among the team members, often known as the "Forming, Storming, Norming" theory.   This was later adapted to include "Performing and Adjourning". During the *Forming* stage the group is in orientation, getting to know one another and how to operate as a group. The *Storming* stage is characterized by conflicts among group members and confusion about group roles and project requirements. The *Norming* stage is where the group begins to organize itself to work on the task. The group has established ground rules to help members work together and social relations have developed enough to create a group identity. The *Performing* stage focuses on performance through collective decision making and cooperation. The final stage is the *Adjourning* or dissolution stage.

An alternative view of group stages is based on the characteristics of projects rather than on the development of group processes. These theories are based on research on work teams. McIntyre and Salas (1995) developed a model of team development based on the skills that team members develop while trying to complete a project. In their model, a team works on role clarification during the early stages, moves on to coordinated skills development, and finally focuses on increasing the variety and flexibility of its skills as a team.

McGrath (1990) developed a model of how project groups operate over time. He describes four types of functions that a group performs: inception (selecting and accepting goals), problem solving, conflict resolution, and execution. Each of these functions has implications on how the group operates, how groups are affected, and how group relations are influenced.

Ancona and Caldwell (1990) present a model of group development for new product teams. The three stages of development are based on the changing nature of the tasks that a team performs. The model highlights the changing emphasis on internal and external relations.

Stage theories are popular, however, not all groups follow these patterns. Some group theorists believe that groups go through cycles that can be repeated throughout the groups' lives. Bale's (1996) Equilibrium Model of Group Development views groups as balancing the needs for task completion and relationship development. Groups go back and forth between these two concerns based on the needs of the group.

Gersick (1988) developed a theory of Punctuated Equilibrium from her research on teams. She observed that all teams experienced periods of low activity followed by bursts of energy and change. Each team had a midpoint crisis where members realized that half of their time had been used and the project was still in the early stages of development, Stage theories help to explain how teams function, and why most of the work gets done at the end of the project. The theories also explain why it is important to build social relations and team norms at the beginning of the project. One must remember that teams do not always follow a specific theory or model and a team's life is a roller coaster of successes and failures. Time needs to be spent developing social relations and socializing new members, establishing goals and norms and defining the project.

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Feedback and Evaluation

"If you want something to improve, measure it."
Unknown

Even after you have executed what you feel is the perfect meeting, it is important to understand the perception of the meeting's effectiveness from the attendees. We cannot assume that what we perceive as an effective meeting is good for everyone. So what do we do? We ask the attendees what they thought of the meeting using a pre-planned evaluation strategy. Warren Bennis (1999) said "Effective leaders develop valued and varied sources of feedback on their behavior and performance" (pg.90). He also explains that true Leaders want to improve (Bennis, 1999). If we request feedback we can change or improve our behaviors in meetings in order to solve problems and adapt our meetings to the needs of the attendees (Levi). As we read an implement feedback we will learn about other people, their needs, and how they assimilate information. Our meeting structure should always be changing based on the needs of the attendees. Requesting feedback is a way to be aware of those needs.

The way you request feedback is up to you. You may choose to have a roundtable discussion with the group, present a written questionnaire, you can even email a survey out to everyone. Whatever way you decide, you should have the evaluation prepared before the meeting begins. The questionnaire should be tailored to the kind of meeting you are planning. If it is an informational meeting you might ask if the topic was well covered and understood. You could ask if the delivery method was practical and engaging. You would also want to include a suggestions section where attendees can write down specific things that worked for them, and things that could be improved. The most important part about feedback and evaluation is to implement those things that make sense and will make the meeting more productive. As you implement new ideas you might mention that the idea came from an evaluation. This will let the members of the group know that they are not wasting their time filling out a form that will be discarded. (Bolton, 1986)

If evaluations are done on a regular basis meetings will be more effective in attaining their specific purpose as well as in fulfilling the needs of the attendees.

Evaluation examples

Online Meeting Evaluation

Web Based or Email Evaluation

Informal Evaluation

Discussion Based Evaluation

Online Resources

www.meetings-ulv.net

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