

**W**e've all been in meetings that could not end soon enough, and in other meetings where much was accomplished and people felt good. Good meetings don't just happen; they require planning, preparation and skills that group leaders and members can learn.

When meetings are fair, open and honest, the opportunity for healthy discussion and meaningful results is increased significantly.

*Fairness includes*

- providing opportunities for people to participate in ways that work well for them. This includes scheduling meetings at convenient times with advance notice;
- being prepared to apply ground rules without bias in the meeting;
- accommodating individuals with special access needs;
- making room for different communication styles;
- making sure the people who are affected by your group's decisions are involved whenever possible in making those decisions.

*Openness includes*

- a meeting process that is straightforward, understandable and explained verbally and in writing;
- an agenda that is the one in front of the group;
- participants who understand their roles in the meeting;

- a safe environment for the exchange of ideas, with agreed-upon and enforced ground rules to support people and their ideas.

Within the context of meetings, *honesty includes*

- telling the truth;
- posting desired meeting outcomes up front;
- eliminating hidden agendas; addressing topics openly;
- taking everyone's input at face value;
- asking for input only when decisions have yet to be made;
- promising what you can deliver.<sup>1</sup>

*A meeting agenda is your group's road map from beginning to end, with all the steps in between for reaching your meeting outcomes.*

### Preparing for Your Meetings

Taking time to involve others in crafting a well thought-out agenda is time well spent. A meeting agenda is your group's road map from beginning to end, with all the steps in between for reaching your meeting outcomes. Here are some ideas for developing an effective agenda.

<sup>1</sup> Viviane Simon-Brown, *Effective Meetings Management* (Oregon State University Extension Service, 1998).



1. *Send out an agenda well in advance of the meeting to*
  - ensure that important business is addressed;
  - remind people of the meeting;
  - help members identify important items and prepare to discuss them;

*continued on page 2*

### What you will learn:

- How to prepare for meetings
- Ideas for conducting a meeting
- How to follow up a meeting for maximum results

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- help members focus on issues, contribute, and feel a sense of progress; and
- ensure that meetings start on time, move forward and stop on time.

## 2. *Detail your agenda.*

- Elaborate on the purpose of each item:

- information— an update not requiring discussion;
- discussion— members can be prepared to explore the issue as a group; or
- decision— requires group action.

- Identify the person responsible for an item by listing their name and amount of time they need next to the agenda item.

### Agenda

7:00 p.m.	Welcome, introductions, overview of agenda (Mary)
7:15	Review & approve last meeting minutes (Bill)
7:20	Update on fundraising campaign to date (Lois)
7:25	Issue: Review final draft of agency brochure (Peter) Outcome: Group decides on brochure content/layout for printing
7:45	Issue: Need to increase public participation in our after-school program (Alice) Outcome: Brainstorm list of possible ways to promote and recruit for the program committee
8:10	Stretch/snack break
8:25	Issue: Creating our goals for the new fiscal year ahead (Vivian & Chris) Outcome: Initial ingredients for our work plan are identified for refinement by planning committee
8:50	Review & debrief our meeting
9:00	Adjourn
	Next meeting date, time & location

- Ensure that anyone who is presenting a report is aware that they are on the agenda, knows how much time they have, has copies of their report or recommendation to distribute, and is provided with any audio-visual equipment needed for their presentation.
- Arrange the agenda items in order of priority, knowing that the early part of a meeting is usually the liveliest, and the order of items influences the meeting atmosphere. Information items are usually brief, requiring no group action, and can be placed first or last on the agenda. Decision items are best placed early on the agenda when the energy level is highest.
- Distribute copies of the agenda so all can follow along and support the group chair in managing the meeting.
- Be flexible and open with the agenda, based on the group's will to proceed as planned, or the group's need to change course.
- Start and end on time unless the group renegotiates a different ending time. If a meeting time cannot be extended, decide which items to defer for the next meeting.

## 3. *Arrange for facilities and materials.*

- Remember that people who are comfortable and relaxed tend to be more productive.
- Hold meetings where the space is comfortable, with good seating, lighting, air circulation, open visibility and an informal atmosphere. Arrive early to arrange the space so it will work for you.

## Group Roles

Running an effective meeting requires the active participation of everyone. Here are some key roles that can either be filled by the same individuals for a period of time, or rotated among members:

- Group Leader:** The group leader is responsible for conducting meetings, guiding discussions, supporting all who want to participate, and making sure that the group is paying attention to how it interacts as it carries out its work.
- Secretary or Recorder:** The secretary records the meeting notes while also serving as an active group member.
- Time Keeper:** The time keeper assists the group leader with the enforcement of time frames established for agenda items, in addition to acting as a regular group member.
- Group Member:** Group members actively engage in the group's work, share airtime, and pay attention to the flow of the meeting.

- Provide healthy food and beverages. They are almost always appreciated and contribute to an inviting setting.
- If group members are unfamiliar with each other, name tags or table name cards with large, dark print help people use names.
- Meet in rooms that are large enough for several small group discussions simultaneously if needed. Tables are helpful if writing is involved. Chairs in a circle contribute to a group discussion in which individuals can see each other's faces.
- Check visual aids such as easels with newsprint, chalkboards, overhead projectors and other equipment in advance to ensure that they are available, they work and you know how to use them.
- Choose facilities with accessible entrances, restrooms and phone service. All signify a welcoming environment for participants.

## Conducting the Meeting<sup>2</sup>

The meeting chairperson, leader or chosen facilitator for the meeting should do the following:

- Convene the meeting on time.
- Introduce the members and guests.
- With the cooperation of group participants, establish priorities and decide how much time to spend on each agenda item. This includes asking the group for additional agenda items and suggestions for group guidelines (how the group wants to conduct its work).
- Keep the group focused on the subject.
- Have the group follow the

time commitments for each agenda item.

- At the end of each agenda item,
  - check to be sure that everyone who wanted to contribute was able to, and
  - summarize or ask someone else to summarize the discussion and outcomes. Make sure the secretary/recorder records the summary.
- As a last agenda item, evaluate the meeting by asking,
  - Did we accomplish our goals for the meeting?
  - What can we do to improve how we work together?
  - What remains to be done?
- Identify the next meeting agenda items if they are known.
- Schedule the next meeting time, date and location.
- Re-cap. At the end of the meeting, give a summary of what was decided. Thank the group for their good work, and make sure the group understands the next steps.
- Call the meeting to a close on time, unless the group has renegotiated a new ending time.

## Following up a meeting

The group chairperson, leader or meeting facilitator should support these follow-up steps:

- After the meeting, the group recorder compiles the meeting notes and action plans. This will remind members of responsibilities and assignments. It also becomes a permanent record of decisions made and actions taken.
- The group leader checks with the secretary/recorder for

<sup>3</sup> Simon-Brown

## Sample Meeting Guidelines

- Start and end meetings on time.
- Stay focused on the issue at hand.
- Listen with an open mind before you speak.
- Speak from your own experience, not for others.
- Respect each other's airtime; avoid side conversations.
- Seek to understand before being understood.
- Share responsibility for the meeting's effectiveness; remind the group of its own guidelines when necessary.

clarity of minutes.

- Leftover agenda items are transferred to the agenda for the next meeting.
- Someone commits to distribute copies of the minutes.
- Any correspondence necessary for carrying out the agenda items is conducted.

## Key Points for Effective Meetings<sup>3</sup>

- Hold meetings only when they are necessary. Determine if individual conversations would be more appropriate. Ensure that meetings have useful content.
- Keep meetings as small as practical. Select only participants who are directly involved and able to deal effectively with agenda items.
- Select a convenient meeting time and location. Make sure the location is accessible to people with special needs.
- Be realistic about meeting length. End meetings before

<sup>3</sup> Simon-Brown

- fatigue sets in. Try to limit the meeting to one hour, and generally never exceed two hours. Create an agenda and use it.
- Inform participants in advance about the purpose, agenda and objectives of the meeting so they can come prepared.
  - Open the meeting with a welcome, overview of the agenda and gratitude for individuals' attendance. Ask members to introduce themselves if they do not already know one another. Encourage participation by all.
  - Establish and maintain an open climate that is conducive to a genuine and free-flowing exchange of ideas. Establish ground rules in the agenda, if the group needs such guidelines.
  - Keep the meeting in perspective. Focus on outcomes and avoid pressuring, criticizing and preaching.
  - Maintain the proper pace. Keep the meeting agenda on schedule. Build in stretch breaks as needed.

- Pause at intervals to summarize ideas and discussion up to that point.
- Summarize at the end of the meeting. State conclusions, recommendations and actions agreed to. Assign responsibility and due dates for action items.
- Set the next meeting agenda if time allows.
- Evaluate the meeting.
- Close on an encouraging note.
- Concisely document the meeting with recorded notes and distribute them to those involved in the meeting, *before* the next meeting.

For more information on improving your group-work skills, consult the other publications in our *GroupWorks* series, as well as the references for this fact sheet listed below.

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## Do we need a committee?

Unless a specific committee job can be stated in writing, a committee is probably unnecessary. Confusion and vagueness about a committee's purpose can lead to frustration. Do not appoint a committee to do a task that can be better accomplished by one person. Re-examine each existing committee and, if necessary, redefine its purpose or eliminate it.

If a committee is proposed, you should be able to answer these questions:

- Why should the committee be established?
- What is its job?
- What are its responsibilities and limitations?
- When should the committee's job be completed?
- What is the budget?
- What other resources are needed and what resources already exist?
- What is the committee's power to make independent decisions?
- What is the committee's relationship with and accountability to the larger group or organization?

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