

Innovation *insights*

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Effective Meetings

People often complain that meetings get off track, or consist of rambling discussions with no decisions or outcomes. This Innovation Insights focuses on the elements of effective meetings and the models and tools a meeting leader can use to increase the likelihood of an effective, productive meeting.

Meeting Basics

Time is valuable, and cannot be replaced once it is gone. For that reason, whenever people come together for a meeting, it is important that the meeting purpose be accomplished as efficiently and effectively as possible.

Meetings can be thought of as falling into one or more of several categories:

- Informational - getting information out and answering questions
- Exploratory - gathering ideas about possibilities
- Decision making - evaluating and selecting alternatives
- Progress reports - tracking work on ongoing projects

Groups may meet once, or may meet on an ongoing basis, such as a regular staff meeting or a project management group, in which case they incur some maintenance or housekeeping activities. In either case the group has a specific purpose for meeting, or the person calling the meeting has a specific reason for getting this group of people together.

The elements of an effective meeting include:

- An agenda
- Planned time for each item on the agenda
- Advance identification of the person responsible for presenting each item on the agenda
- A record of the meeting – a timely summary of key discussion points, decisions, action items (who will follow up on what when), and remaining open issues, but not necessarily who said what

If the group will be meeting on an ongoing basis, they will need to decide how they are sharing ongoing responsibilities and what they can expect from each other. This can include how the minute or note taker will be determined (for example, rotating in first name alphabetical order), and what the format of the minutes will be (to simplify writing the minutes). Several of the references listed, and Microsoft Office Word, provide templates for planning meetings and recording the minutes. An ongoing group will also need to decide what constitutes a quorum at a meeting, so that those not present accept the decisions made by those who were there and are ready to move on at the next meeting. Ground rules can address issues such as starting and ending meetings on time and not interrupting each other. For a group with ongoing meetings, at the end of one meeting the group members

should be able to determine the agenda for the next meeting.

In *How to Make Meetings Work*, a classic guide to planning and managing successful and productive meetings, Doyle and Straus identify five ingredients of an effective meeting (p.32):

1. Common focus on content
2. Common focus on process
3. Someone responsible for maintaining an open and balanced communication flow
4. Someone responsible for protecting individuals from personal attack
5. Clearly defined and agreed upon roles and responsibilities for all involved

The common thread in this is an individual in charge of the meeting who maintains focus and manages communication and activities within the meeting. This may be the group leader, committee chair, or an external facilitator.

Meeting Models

It is important that all participants know what type of meeting they are attending – sharing information, gathering ideas, making a decision, tracking progress, or some combination of these. In a decision making meeting it is also important that both the leader and meeting attendees are clear who will be making the decision, and how.

Tannenbaum and Schmidt's model of a decision making continuum in "How to Choose a Leadership Pattern" is useful. At one end of the continuum, the leader may make the decision with no input from the group. At the other end of the continuum, the group may make the decision with little or no input from the leader. Between these two points are situations where the leader will make a decision based on discussion with the group, the leader and group will jointly make a decision, or the group will make a decision within parameters defined by the leader.

If both the leader and group are not clear at the start of the meeting what type of meeting they are having, or where they are on the decision making continuum, the result may be an ineffective meeting or angry and frustrated meeting participants. Where on this continuum the decision making lies may have an impact on how the leader chooses to lead the meeting. If the group will be making the decision, they need to determine in advance the approach they will use to make the decision, whether it is reaching consensus through open discussion, multivoting to prioritize alternatives, or another option.

A first step for effective meeting and planning is using the SMART approach. Meeting goals or outcomes (whether they be sharing information, identifying alternatives, reaching a decision, or developing an action plan) should be:

- S - specific
- M - measurable
- A - attainable
- R - relevant
- T - time and resource based

There are several models the leader can use to help implement this approach and manage the meeting, either informally or formally.

Plan and Run Your Meeting Like A Reporter

One approach the leader can use to plan and manage meetings effectively follows the guide for writing a newspaper article – keep asking what, who, how, and when. Marshall’s *Energetic Meetings* expands on this. The leader can use these checklists as he or she manages a group discussion to make sure all necessary items are covered.

What...?

- is the goal
- is it
 - specific
 - measurable
 - attainable
 - what we want to accomplish
 - worthy of the effort
- do we need to know or explore
- feelings do we have about the goal

How...?

- will we achieve the goal
- can we generate or maintain enthusiasm
- will we demonstrate we have achieved the goal

Who...?

- is excited about the goal
- will be responsible
- else is involved
- is the audience
- must be informed
- can help
- may hinder

When...?

- must we achieve the goal
- are the intermediary steps or deadlines
- do we return to the group with a problem

A Developmental Approach to Meetings

In *Team-Managed Facilitation*, Kinlaw defines a successful meeting as one in which:

- All tasks are performed effectively and efficiently
- The group has further developed and ensured capacity to continue to produce excellent results
- The group meeting is consciously viewed as an object of continuous improvement

The continually improving meeting implies that the group will be meeting on an ongoing basis; Kinlaw’s guides for leader intervention can be used at individual meetings. The model has three stages: *potential*, *performance*, and *results*. Results depend on the potential brought to the meeting and performance during the meeting. The model also identifies functions the leader can fill at each stage to help the group have a successful meeting and improve their meeting skills.

Potential is what the group starts with. This is composed of both resources and structures. Resources are what the group has – the right people, commitment, preparation, access to information, facilities and equipment, time, external support, communication and problem solving skills. The leader helps the group clarify what resources it has and needs. Structures are related to the long term strategy of the group and how it operates - roles, norms, decision making methods, goals, tools, and processes. The leader helps the group identify and address related questions – ground rules, for one.

The group’s *performance* is the result of how they use those resources to meet, communicate and achieve understanding. Rational processes include short term tactics such as the flow of meetings and using a structured approach. The leader can help the group identify an approach or process, such as a meeting agenda or the Plan-Do-Check-Act or IMPROVE model, and follow its steps. Effective communication supports development and use of

resources, structure, and rational process. Effective communication is:

- Appropriate - timely and relevant
- Concrete - including data, and specific examples
- Respectful - using active listening
- Team centered - focusing on group goals

Effective communication is not generalizing or ridiculing, or judging or blaming team members or others. Through effective communication, the leader keeps the group aware of what it's doing and ensures the group makes conscious decisions. Understanding on the part of group members results from using rational processes and effective communication to gather, examine, and evaluate data and alternatives.

Group *results* include the accomplishment of the task, development of the group, and more effective meetings.

In Kinlaw's model, the leader decides when to intervene in group discussions or activities based on three criteria:

- Listening to understand: Is the leader hearing what was said, not what was expected or assumed?
- Modeling quality communications: Is the communication group centered, focusing on group, not individual, needs?
- Keeping the group conscious: Are they on track? Are they aware of the decisions they are making or not making?

As the group becomes more mature, its members take on the behaviors the facilitator has modeled and the leader has a lesser role.

Evaluating Meetings

As Kinlaw's model shows, while the group and leader are working on a specific meeting topic or project, they have opportunities to make their meetings more effective. To do this, they need data about how effective the meetings are.

The first question to be answered in evaluating meetings is: What exactly are you going to evaluate?

- Who are you going to evaluate?
 - Yourself (each group member evaluate themselves)
 - Your group leader/facilitator
 - Your whole group
- What are you going to evaluate?
 - Meeting content
 - Group process
- How are you going to do the evaluation?
 - As a whole group, or individually
 - Via discussion or survey (paper or online)

In one quick approach, the group discusses what went well and what they could do differently next time, developing two lists. This is often called the "plus/delta" approach, with a "+" heading the list of things that went well, and a "Δ" (a triangle, the Greek letter delta and the mathematical symbol for change), heading the list of things that could be done differently (or changed) next time. This approach can be effective to identify improvements for the next few meetings, but it requires a group in which all members are willing to speak freely about the

group’s performance, and it requires that time be allocated at the end of the meeting for the discussion.

For a more detailed analysis, one which provides quantitative results that could show improvement over time, or in situations where group members may want to make their inputs anonymously, the group may want to consider a survey. Sample questions are below, with a basic five point scale from strongly agree to strongly disagree. A group may want to use a survey after a few meetings to get a sense of how things are going. For example:

Item	Response				
	Strongly agree				Strongly disagree
	5	4	3	2	1
1. Goals of the meeting were clear					
2. Group members were prepared					
3. All group members contributed effectively					
4. Leadership was effective					
5. Time was used effectively					
6. Group accomplished goals					
7. Next steps/activities are clear					

Use of a survey involves tabulating (although Web surveys can simplify this) and interpreting numerical scores. It’s also important to determine in advance how the data will be used. Will there be an opportunity for written comments? Will the data be shared with the whole group? Will there be another survey in the future to look for improvement?

Summary

In summary, it is not difficult to manage a meeting effectively. It takes planning. It also requires one or more individuals at the meeting who can focus on the group process as well as the content of the meeting discussions, and maintain a broad view of the meeting’s purpose and how it will be accomplished. If the group will be meeting regularly, there are tools for assessing and improving group meeting performance, to produce more satisfying meetings.

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