LEADS

UNIT III: Group/ Organizational Leadership Skills

Module 2:
Effective Meetings

Would you plan a bus or airplane trip without consulting a schedule of times and destinations? Probably not. A meeting agenda is your group's schedule of departure and arrival. It marks the way toward achievement of goals.

What's going to happen at the next meeting? What business will be discussed? What issues will require a decision? Will someone give an informational report? Don't be taken by surprise at your meeting...Plan! First prepare a list of what business to discuss. The list should name only items that require the attention of the membership. Next, consider how items will be presented, what to discuss, and how to present it. Remember that all of the group can and should be involved in planning and participating at meetings.

The Agenda

An agenda is a step-by-step order of points to be covered. A tentative agenda should be sent to all members prior to the meeting:

- To insure that important business is not overlooked.
- To remind people of the meeting.
- To help members identify important items and prepare to discuss them.
- To help members focus on issues, to contribute, and to feel a sense of progress.
- To insure meetings start on time, move forward and stop on time.

Developing the Agenda

Days or even weeks before the meeting, the facilitator, chairperson, or presiding officer should begin preparing the agenda. This person should review program plans and actively involve other officers, chairs, and group members who may have items of business to offer.[1, 2]

Expected Action

Agendas that are too brief or vague can actually hinder the progress of a meeting. Properly prepared agendas, on the other hand, almost always make meetings run smoothly. In a well-prepared agenda, items are elaborated. For example: An item listed simply as "Fairboard Report" doesn't tell us very much; adding "select representatives and consider alternative date" says more. Be certain to indicate the expected action for each item. Here are some common phrases for conveying expected action: "for information," "for discussion," and "for decision." These phrases will help members anticipate and prepare for the action. If a particular person has responsibility for an item, place that person's name in parentheses just below or to the right of the item. This information tells members who the contact person is and serves as a guide for the chair.[1]

Setting Priorities

The order of items can be critical to the success of a meeting. For some items, the order is obvious. For example, you usually don't discuss the budget for equipment purchases before you discuss your equipment needs. Some agenda orders, however,

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are not so obvious. Informal meetings for planning or problem solving may benefit from these suggestions.

Guidelines to Help Establish Priorities

1. The early part of a meeting is usually the most lively and creative. Therefore, items requiring mental energy, bright ideas and clear heads should appear early on the agenda. An item of great interest to everyone might be scheduled for 15 or 20 minutes into the meeting to avoid the attention lag that typically occurs at this point and to involve any late arrivals.
2. The order of items influences the meeting atmosphere. Some items tend to unite the group, while others divide it. The leader may want to start on a point of unity, progress to items likely to evoke differing opinions, and end the meeting on a unifying note.
3. Long agendas require momentum, because members need to feel that progress is being made. Use your labels of "information," "decision" and "discussion" to help set the agenda. Information items should come first or last. Since they require no group action, they should be brief. Decision items should come early on the agenda. If a decision item becomes a discussion, table it until you are ready for the discussion items. This procedure may not cover the entire agenda, but it will keep the meeting on track and leave members with a feeling of accomplishment.
4. The order of items can save valuable time. Listing "Any Other Business" on the agenda may save time in planning, but it can turn into a frustrating waste of time. Unstructured or informal discussion is healthy, but it must be managed so that it comes near the close of a meeting and only if time permits.

Using the Agenda

Copies of the agenda should be distributed to all members several days before the meeting. Minutes from the last meeting or an abbreviated set of minutes listing decisions and needed action should also be distributed when possible.

The meeting agenda must be flexible and open to revision. Early in the meeting, the presiding officer should ask the group to review the agenda. Have any pressing issues been omitted? Is there need for some revision? When making revisions, consider the time avaliable. Do not lengthen the meeting time; instead, decide which items can be deferred to a later date.

When it comes to time, flexibility can be more of a hindrance than a help. Time is important to most people. Therefore, you should start and stop at the time specified on your agenda. Starting late penalizes people who arrive on time, and makes it difficult to end on time. Repeated late starts encourage people to arrive at a later time and to form bad habits. Meetings that drag on past the ending time can contribute to feelings of guilt, resentment, impatience and tension. Schedule breaks during long meetings.

Information Sent with the Agenda Should Indicate:

1. The name of the group.
2. The title or topic of the meeting.
3. The name and phone number of a contact person.
4. The time, date and location.

5. The decision-making method to be used.
   • Majority Rule (most people have to agree)
   • Consensus (all people have to agree or at least be awilling to support the decision)

Agenda Items for Formal Meetings Should Include:

1. Call to order.
2. Reading and approval of the minutes from the last meeting.
3. Reports of officers and standing committees.
4. Reports of special committees.
5. Unfinished business.
6. New business.
7. Adjournment.

Preparing for a Meeting

Learning and working will be at their best when everyone is comfortable and relaxed. Participants should feel that the time they have spent at the meeting is worthwhile. Although no one can guarantee that all meetings will be regarded as meaningful, the chair or facilitator can take some steps to make the meeting as effective as possible by carefully arranging for facilities and materials, as well as a comfortable social environment.[2]

Physical Setting

Participants in meetings will contribute more and get more out of the meeting if the physical setting is comfortable and the atmosphere is informal, supportive and relaxed. Desirable physical arrangements will vary depending on the size of the group and the purpose for which the meeting has been called. Informal room arrangements are recommended to make everyone feel reasonably comfortable and equal in the group.

Pre-Arrangements

If at all possible, check the meeting room in advance. Some rooms just are not suitable. They might make an undesirable impression on the group members or require exceptional arrangements.

Arrive 20 to 30 minutes early to check that arrangements have been completed. This will also allow you to make any corrections if necessary.

Name Tags or Table Tents

If group members are unfamiliar with each other, name tags or table tents are important. They will speed the development of group cohesiveness since participants will be able to use names in addressing each other. To be useful they should be large enough to read across the table. Made with magic marker on light paper, they can be pinned to the person or set on the table in front of them.

Room Arrangements

Select a room that is large enough for several small groups to meet simultaneously or to accommodate a single, large group. If possible, select a room with furniture that can be moved easily, especially if a rearrangement for small group discussions seems likely.

In small groups (up to 20 people) chairs can be arranged so that everyone is facing each other. It is important for each participant to have plenty of space in which to sit and work, take notes, or spread papers for notebooks and handouts. Tables should be available, unless it is a very short or very active meeting.

To accommodate a large group, rows are a better arrangement. Curving the rows in a half moon shape with ends closer to the front, improves this. Make sure extra chairs are available to accommodate a larger than expected crowd.

In a small group, the facilitator can sit among the group members. In a larger group, the facilitator may stand so that he or she can see the group and also be seen by the group. Avoid a head table at informal meetings since it emphasizes the “power role” of the facilitator through its physical separation. It also indicates a larger difference in status than if the facilitator is standing in front of the group without lectern or table as a barrier.

Determine how you can regulate the temperature and ventilation. As the meeting progresses, someone may need to make adjustments to keep the room comfortable.

Materials

It is necessary to have a chalkboard, newsprint pad or overhead projector for writing that is to be visible to the entire group. Don’t forget the appropriate writing equipment (chalk, magic markers, writing pens, etc.)

The speaker or facilitator may want to use visual aids. Double check equipment needs such as an overhead projector, slide projector, tape recorder, etc. Extension cords, spare bulbs, and a small table to hold the equipment and visual aids should also be on hand.

Access

Make sure you have keys to open all of the rooms that will be used during the meeting. Locate the restrooms and a telephone which are accessible to meeting participants.

Social Setting

The social or emotional environment describes the way group members, including the leader or facilitator, relate to one another. Trust and respect are among the most important foundations of the social environment for a group. Many group building techniques can be used to build this foundation.

Refreshments build group togetherness and congeniality. Food and beverages should be prepared ahead of time so that they are available when the first person enters the room or the break starts. Make sure there are enough napkins, cups and paper plates on hand.

How to Run a Better Business Meeting:

The Facilitator of the group is responsible for conducting meetings, guiding discussion, and making sure that the group is using effective processes for doing its work.

The fundamental difference between a Chairperson and a Facilitator is the directiveness of the Chairperson role. The Chairperson makes rulings, determines procedures, rules people out of order, etc. The Facilitator proposes, suggests, invites, and then consults with the participants to generate a consensus. The Facilitator's "power" comes from the group. An effective Chairperson will follow many of these same procedures.[3, 4]

Leadership Roles

***Group Leader*:** The group leader is responsible for conducting meetings, guiding discussions, and making sure that the group is using processes for doing its work.

***Secretary or Recorder*:** The role of the secretary is to record the meeting notes while performing the role of a group member.

***Time Keeper*:** The time keeper assists the group leader with the enforcement of time frames established for agenda items, in addition to performing a regular group member role.

***Monitor*:** In the formative stages of group development, it may be helpful to ask one group member to monitor the group process. An evaluation form is helpful for this meeting.

The Facilitator should be conscious of the potential to dominate the group, and try to control such tendencies. The Facilitator should avoid talking a lot, not argue intensely with group members. If this is not possible, a more neutral facilitator should be chosen. He or she should also try to draw everyone into group deliberations and be sure that everyone's comments are recorded.

Below is a list of things a Facilitator has to be concerned about, as well as ways they can handle each situation:[1, 3, 4]

1. Keep the meeting focused on the topic:
   - Point out that the discussion has drifted. Usually the meeting will quickly return to the topic.
   - Watch the timing.
2. Clarify and accept communication:
   - Summarize the contributions of participants. Summarize in particular, the contributions of participants who have not been actively involved. "Your feeling is that..."
   - Relate one participant's idea to another. "If I understand it correctly, your idea would add on to Tracy's by..."
   - Accept incomplete ideas. "Could you develop that idea a little more?"
   - Point out when a group member's contribution is cut off and invite him or her to complete it. "I'm afraid that we may have cut Kelly off. Did you have more you wanted to contribute, Kelly?"
3. Accept feeling as valid data:
   - Summarize feelings as well as content. "You feel angry when..."
   - See that ground rules are followed.
4. State a problem in a constructive way so that group members can work on a solution:
   - State the problem in such a way that it doesn't sound like blame-fixing or an accusation of the participants. Reframe issues if needed.
   - State problems, not solutions. Often asking a question is useful.

• Help clarify the areas of decision making. “As I understand it, the Wilderness Act does not allow for development of recreation areas: however, it is open to us to recommend classification of this land.”

5. Suggest a procedure or problem-solving approach:
   • Point out when it may be useful to move on to the next problem. “I’m wondering if we’re ready to move on to...”
   • Develop a visible way to make notes for later discussion.
6. Summarize and clarify direction:
   • Summarize your understanding of what the meeting has accomplished and indicate what the next steps will be.
   • When delegating tasks, be sure the “delegatee” agrees to accept the responsibility and the time frame.
7. Avoid dominating behaviors:
   • Critiquing of ideas.
   • Making procedural decisions without group consent.
   • Exploiting his or her role to propose or argue for positions.
   • Providing lengthy comments.

Conducting the Meeting[1, 2]

1. Call the meeting to order promptly.
2. Introduce the members and guests. Consider a group building/get acquainted activity instead of formal introductions for less formal meetings.
3. With cooperation of group participants, establish priorities and decide how much time to spend on each agenda item. Ask the group for additional agenda items.
4. Keep the group focused on the subject. This can be accomplished by monitoring the discussion and informing the group when it strays from the agenda.
5. Have the group follow the time commitments for each agenda item. A two-minute overtime may be allowed for those agenda items not completed in the allotted time. During this overtime period, the agenda item should either be completed or assigned as an agenda item for the next meeting.
6. Be attuned to, and help avoid confusion through ground rules. Present the agenda on newsprint or chalkboard. When possible, specify how many minutes can be spent on each topic and who will speak. If anyone takes up too much time on one topic, you can remind the group that they need to stay on schedule. This will help move the discussion along.
   - If there is hostility about subjects to be discussed in the meeting, bring it out in the open immediately. For example, you could say, “I’m well aware that there are strong feelings about matters on the agenda today. I know some of you are not happy to be here. I understand how you feel in these circumstances.” They should know that you do indeed understand.
   - Keep discussion lively and moving.
7. At the end of each agenda item:
   - Check to be sure that everyone who wanted to talk was able to contribute to the discussion.
   - Summarize or ask someone else to summarize. Make sure the secretary also records the summary.

8. Conduct or ask someone to conduct a feedback session during the last ten minutes of the meeting. Ask the following questions:
   - Did we accomplish our goals for the meeting?
   - What remains to be done?
   - Was any time wasted? If so, when and how?
9. Schedule the next meeting time.
10. Call the meeting to a close.
    - RE-CAP (if meeting needs to be continued at another time). At the end of the meeting, give a summary of what has transpired. Be positive and make sure the next steps are understood by the group. After the meeting, notes of relevant discussion and action plans which were decided upon should be recorded and distributed to the participants. This will serve as another reminder of responsibilities and assignments. It also becomes a permanent record of actions taken.[1]

After the Meeting

1. See that the meeting room is left clean.
2. Check with the secretary for clarity of minutes.
3. Transfer leftover agenda items to the agenda for the next meeting.
4. Send thank-you notes to guest speakers.
5. Distribute copies of the minutes.
6. Conduct any correspondence necessary for carrying out agenda items.
7. Contact any speakers identified for the next meeting.

Sharing Responsibilities

The facilitator's role is to really make sure all the essential tasks get done smoothly. Others can and should carry out some of the work.

Committees

Contrary to what some critics claim, committees don't have to be "many-headed monsters." Committees can open avenues for sharing work and responsibility among group members. Given realistic goal-setting and careful selection of members and leaders, committees can achieve a great deal.

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 better accomplished by one person. Re-examine each existing committee and, if necessary, redefine its purpose or eliminate it.[1]

If a committee is proposed, you must 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 resource are needed and what resources are already available?

It is the parent group's responsibility to define the committee's purpose and specify its limitations and responsibilities. A clear understanding of these factors enables committee members to function more effectively. In new situations, a group may have to develop its own goals within a broad framework.

Standing and Special Committees

Standing committees are reappointed regularly to handle ongoing concerns. Examples include membership, finance, publicity and program committees. Special committees are *ad hoc*. They are appointed as needed to accomplish special objectives within a specified period of time. They rarely exist longer than eighteen months. Examples include a special project committee, a building committee, and a one-time special event committee.

Committee Members: Selection and Orientation

Selecting a committee member for a particular job is more effective than asking for volunteers. Selection enables you to consider the skills and interests of available people and to ensure that the group is neither too large, nor too small to get the job done. Committees of five to nine people usually work well. Some committees have as few as three members; others have more than fifteen. When the size approaches fifteen, consider selecting subcommittees or dividing the task among several smaller committees of equal standing.

Orienting the committee is usually the responsibility of the committee chair. Members must understand the committee's purpose and specific assignment. They need to know what is expected of them individually and as a group.

For a committee to be effective, members must accept responsibility. As a member, never accept a committee assignment unless you have sufficient time and interest.

Committees should be appointed when a job is too large for one person. Committees can help define an issue, resolve a complex problem that requires several perspectives, and involve group members in the work of the organization. Planning ahead is a key element for successful committees. With proper planning, committees can reduce the workload of an organization's chair or president.

Committee Chair: Selection and Orientation

Chairing a committee means coordinating committee activities. The chair must see to it that the job is completed and that work and leadership roles are fairly distributed among committee members.

Select a chair who is a team worker-someone who is interested in the job to be done and who can motivate the committee to do it.

Train the person chairing the committee. People are often told, "Take the job; there's nothing to it." This approach is both unwise and unproductive. Orientation should acquaint the chair with the specific purpose and duties of the committee, how the committee fits into the overall organization, and what will happen to the committee "product." Consider how the person's interests and skills can be used in chairing a committee. Giving people an outlet for their abilities show them how their personal involvement can help the group. Reverse the usual pattern: Rather than trying to make the person fit the job, build the job around the person's skills and interests.

Building the Committee Agenda

An effective committee needs an agenda. A step-by-step outline is occasionally enough, but more often a detailed agenda is necessary. Generalized goals are too vague and provide little direction for committee members. Detailed agendas bring items into clearer focus. Items must be specific, measurable, and realistic. Poor agendas are the biggest cause of committee failures.

Follow Through Responsibilities

The committee should write a short (one-page) report when requested, when major jobs are completed, or annually. The report should describe how the job was carried out, give suggestions for the next committee, and discuss both successes and failures.

The organization has the responsibility of responding to committees' efforts. Regularly filing committee reports shows acceptance and requires no further action, but does not necessarily imply agreement. Approving or adopting a committee report shows that the group agrees to follow the recommendations in the report. Finally, the parent organization must give the committee feedback concerning the usefulness of its work. Feedback should include how the report or recommendations were used and what results the committee's work achieved.

Choosing the Specific Site

1. Consider the possible rooms within the selected location.
2. Make sure the site is appropriate for the structure you plan to use to obtain meeting objectives.

SITE SELECTION CHECKLIST	YES	NO
1. Is the size of the room suitable for the number of meeting participants?		
2. Are the chairs in the room appropriate? Are they comfortable?		
3. Are the temperature controls visible?		
4. Is there someone available to help set up the room?		
5. Do you know where the light switches are?		
6. Do you have adequate light sockets and extension cords?		
7. Is there space to hang up completed wall charts?		
8. Are there drapes that close on the windows?		
9. Does the room provide clear views for visual aids?		
10. Is the room located away from kitchens, hallways and coffee-break areas?		

Effective Meeting Planning Sheet

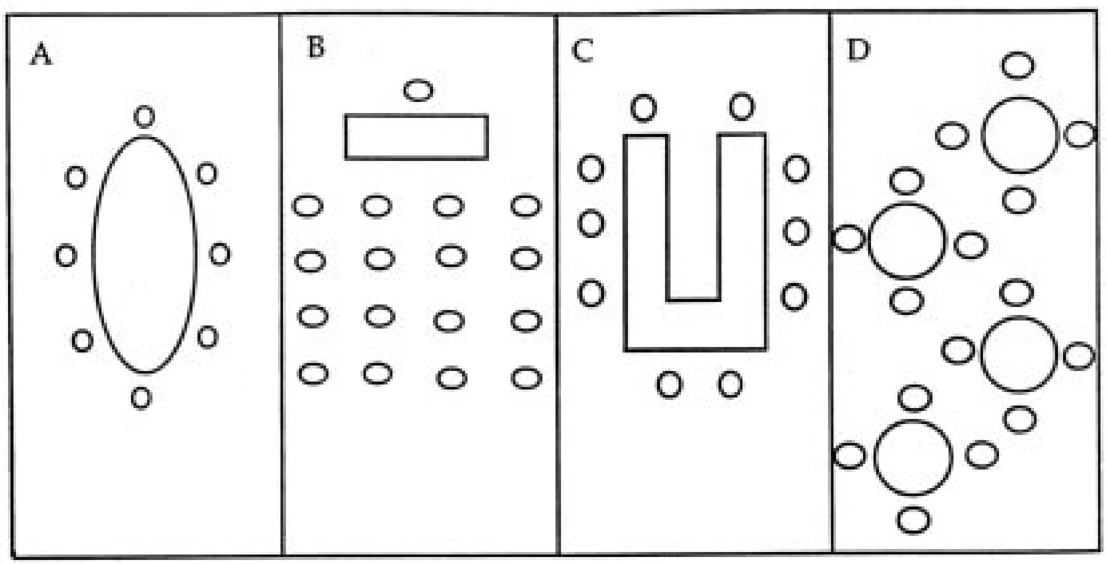
Session Number/Title	Date: Time: Location:
Purpose or Objectives	
Committee(s) Involved: Members:	Chair(s) of Committee:
Facilitator(s) for the Session:	

TASKS	SPECIFICS	WHO WILL DO IT?	(By) WHEN?
FACILITIES (check the following): • Central location • Large room (so small groups can meet at the same time) • Can walls be used to post newsprint? • Can temperature & ventilation be controlled? • Can lighting be controlled? • Enough tables & chairs available? • Can the furniture be moved around freely?			
ACCESS (check the following): • Keys available to all areas that will be used • Restrooms are accessible • A phone is available • Adequate parking			
MATERIALS (check the following): • Microphone set up & working? • Enough easles/chalkboards? • Markers & chalk? • Newsprint & tape? • Overhead projector? • Audio/video tape recorder?			
PUBLICITY/PROMOTION: • Distribute brochures/fliers to public places • Distribute news releases to local newspaper & media • Media contact with reporters • Arrange for pictures			
REGISTRATION: • Direction map • Parking permits • Name tags & tent sign if using a panel of speakers			
FOOD/REFRESHMENTS			
TRANSPORTATION (if needed)			
BUDGET/FINANCES			
AGENDAS/PROGRAM: • Select & contact speakers or other resource people • Handouts, questionnaires, notebook information • Paper, pencils, pens			
CERTIFICATES/AWARDS			
FOLLOW UP: • Evaluation(s) • Thank You’s			
OTHER TASKS (list): • Parking • Exhibits • Door Prizes • Speaker Gifts			

Room Setups

Using the diagrams below, think about which room alignment:

- Suggests "we talk, you listen" or "you talk, we listen."
- Implies participation and work to be done by audience.
- Will allow for maximum participation by the most people in the shortest amount of time (people talk to each other).
- Will allow an "axe grinder" the largest audience.
- Fosters confrontation among diverse or polarized interests.
- Will allow input from all participants on an equal level.
- Will allow a maximum quantity of information to be presented in a short time.



In what ways does the arrangement of the room affect the kind of interaction communication that takes place in a meeting?

Chairs and tables arranged so that people can easily see one another foster communications — both talking and listening — amoung the audience or group members. Round tables suggest that people may work in small groups on activities or tasks. People talk to each other easily at round tables.

A formal arrangement, such as a head table, often implies that the person at the table is in charge or is someone invited to provide information. This is the typical arrangement for a lecture. The audience will be more comfortable if tables are provided for them, rather than just chairs in the classroom manner. An "axe grinder" can express opinions easily with this arrangement. For a smaller group, a large rectangular table plus a head table can be used, although this creates distance between the leader and the group members.

The U shape arrangement also makes it easy for everyone to sit and talk to one another. However, if there are two distinct and opposing sides, the facilitator should assign seats so people with one interest are not seated together on one side and all the people with the opposing interest on the other side.

A large oval table also promotes discussion and equal participation. A rectangular table can be used in this way also, but it is more difficult for everyone to see on e another.

The herringbone arrangement is similar to the classroom set-up with tables. The tables are slanted and a center aisle is left through the center for easier access. Visibility and participation are somewhat better because some people can see others clearly.

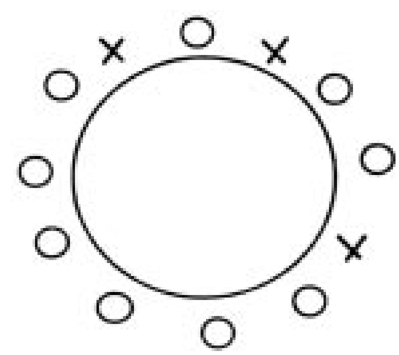
The doughnut is another word for a circle of chairs where everyone faces one another. This arrangement promotes communication but people may have difficulty in taking notes or writing on newsprint.

The office desk arrangement may be suitable for just a few people, although it's hard for people on both sides to read things. The desk often is regarded as a barrier or power symbol. It's usually better to figure out a way for everyone to sit on the same side of the desk or table.

Consider the following when arranging chairs:

- Face chairs and people away from doors and windows when possible.
- Beware of energy holes. Begin with too few seats rather than too many.
- You may want to block off the back rows at the beginning of a meeting to get people to sit toward the front.

X = Empty Chair: Empty Chair = Energy Hole



ROOM SETUP	ADVANTAGES	DISADVANTAGES
1. CLASSROOM	a. Allows for many people. b. Leader is clearly in charge.	a. Encourages one-way communication. b. Encourages side-bar conversations. c. Hard to hear in back of room.
2. U SHAPE	a. Convenient for 6-20 people. b. Easy for leader to have eye contact with all.	a. Discourages small group team-building. b. Reduces getting to know other people. c. Limits movement of leader.
3. ROUNDTABLES — PARTICIPATORY	a. Builds teams. b. Easy for leader to move around.	a. Increases side-bar conversations. b. Requires wide room.
4. HERRINGBONE	a. Allows use of tables for many people. b. Creates center aisle.	a. Hard to hear in back of room. b. Creates impersonal mood.
5. CIRCLE	a. Hard to select a leadership position. b. Good morale for people.	a. Hard to select a leadership position.
6. RECTANGLE	a. Good for staff meetings. b. Leader can assert control in front of the room.	a. Limits number of people to size of table. b. Encourages discussion.
7. FOCUSED RECTANGLE	a. Creates leadership position. b. Allows for more people than a rectangle.	a. Creates distance between the leader and group.
8. DOUGHNUT	a. Equalizes status of group members. b. Easy to see everyone.	a. Limits number of people to size of doughnut.
9. OFFICE/DESK	a. Creates authority. b. Allows intimacy.	a. Can be seen as threatening.

COSIDER THE PURPOSE OF THE MEETING AND THE PHYSICAL POSSIBILITIES, THEN MAKE THE BEST ARRANGEMENT YOU CAN IN THE SITUATION.

Summary

An effective meeting begins with a well-prepared agenda and a comfortable physical setting. Learning will be best when the participants are relaxed and the facilitator is well organized and aware of roles. With proper planning, committees have a vital function in the work of a group. The more aware participants are of their roles, the more likely the desired results will be achieved.

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