Running Effective Meetings

Rob Sandelin, ConsensusWorks!, Email Floriferous.msn.com

A common characteristic of great facilitators is that they have poise. To help remember the skills of a facilitator the word poise can stand for:

Planning: A good plan helps the facilitator be effective
Observation: A great facilitator observes group members; applies that information to the plan
Instruction: Sometimes timely instruction is appropriate
Sensitivity: Work with the moods, emotions and passions of the group
Evaluation: Learning comes from each facilitation

When a group of people get together in one place there needs to be some protocols on how to best work together as a group. There are different ways to organize your group meetings so the time you spend together is fulfilling and useful. Which ones you use will depend on the size and make up of your group. This chapter deals exclusively with business meetings, which are different than sharing meetings. An effective meeting is one where the participants feel good about themselves and the group, willingly and openly share their ideas and concerns, work together constructively and positively and leave the meeting feeling fulfilled and glad to be part of the group.

Facilitation is the key to success

The facilitator has a crucial and demanding role, directing the flow of discussion, resolving roadblocks, summarizing points, and keeping the discussion on track, capturing ideas and digressions, sheparding the emotions of the moment, keeping the spirit positive and productive. Having a well trained, excellent facilitator will create a high quality experience and outcome for your meetings. Putting your meetings in the hands of an untrained facilitator can lead to ineffective and less than satisfying results. You should have at least 2 people in the group who have the commitment and skill to run your meetings. Encourage facilitation training and learning.

The facilitator is not the leader of the meeting, rather a tool of the group, responsible for directing the process so the participants can focus on the content. A good facilitator is everyone's ally and no one’s friend. If the facilitator contributes to the discussion, he or she should speak last and attempt to summarize what has been said. The facilitator must remain neutral on whatever issue is on the floor. A good facilitator gets a discussion going, keeps it on track, draws out everyone, and summarizes the key elements of the discussion. The facilitator may also assign tasks and set completion criteria such as when a task needs to be done. A great facilitator captures the emotions of the participants, delves into the roots of concerns and feelings, and uses positive reinforcement, drama, and numerous other tricks to keep the participants happy and functioning at the optimum level.

Some groups rotate facilitation so each member gets a chance. Other groups use a small group of members that have had facilitation training. It is a large benefit to the group if one or more people specialize in facilitation and become expert facilitators. Becoming an excellent facilitator takes considerable time and dedication. Sometimes being impartial is difficult for the facilitator, especially if the issue under discussion is one the facilitator really cares about. Having a small team of facilitators gives the group added benefits and lets any facilitator who is conflicted step aside.

An excellent facilitator does many things in a meeting and needs to have lots of practical and theoretical understanding of how groups work. .

A Facilitators Checklist

Before the meeting:

- Make a plan. Think about how to approach each agenda item. Are there any specific agenda items which may need a special format for discussion or resolution? Are their issues which will evoke strong feelings or emotions? Plan some what if scenarios - What if we split on this issue what process will I use, What if Susan gets loud again?
- Check the environment. Enough chairs, is there food or snacks available, does the lighting set the right mood, is it stuffy, warm enough, is there space to do what I want to do?
- Check supplies. Do you have everything you need? Paper, pens? etc.
- Write the agenda for all to see using action words to describe outcomes.
- Review outstanding old decisions or discussions from the last 2 meetings minutes. Is there a follow-up needed?
- Check yourself. Are you feeling well and have the energy to facilitate today? Do you have any hidden agendas you need to put in front of the group or realize within yourself? Take time to silently prepare yourself.
- Set a goal for the meeting and write it down so all can see.
- Assign volunteers for meeting tasks such as scribe, doorkeeper, etc.

At the beginning of the meeting:

- As people first come into the room do a check of the body language of each person. Is there tension in the room. Does someone have an obvious vibe that you might need to tap before the meeting starts?

As the meeting begins

- Check in yourself to the group. Explain how you are feeling, any special things happening today, the tone. Ask for feedback and help making the meeting work well. Share your goal(s) for the meeting with the group.
- Check in with the agenda.
    - Review the agenda and prioritize. Ask for any additions or deletions.
    - Set times for discussions and assign each item an owner.
    - Be sure that items on the agenda are appropriate for large group discussion rather than small group work.
- Announce who is filling the other roles, if you have them.
- Launch the meeting with a fun activity that energizes the group.

As the meeting runs

- For each item on the agenda summarize previous discussions or decisions about the agenda item to bring everyone up to date.
- Watch for dominance of speaking time and ask those who are quiet for ideas and thoughts. Ask: " I’d like to ask those who have not yet spoken to contribute."

- Summarize points and clarify discussion. If an agreement is being sought, grab elements as they emerge in discussion and trial test them. It helps to write down the topic or issue under discussion so everyone can see and refer to it.
- Catch any items which have not been resolved, or come up in a discussion and ask the group what to do with them.
- Note digressions and remind members to stay on task. Write related digressions up on the board and ask the group to delay consideration of this until later - then after the current issue is finished, ask the group what to do with it.
- Make sure you have eye contact with the people you speak to.
- Listen for and watch body language to catch any unexpressed issues or feelings. Note it to the group
- Watch for comments which create a negative environment and point it out to the group.
- Guide members who speak much to be briefer.
- Watch for restlessness and take breaks when you sense the need for one.
- Be sure any tasks generated are assigned to specific individuals or groups.

As the meeting ends

- Run through all task assignments and list any decisions made so any misunderstandings can be cleared before people leave.
- Debrief the meeting with yourself at least, or with the group. What went well, what could be improved.

Launching the meeting: creating a positive meeting environment

At the beginning of a meeting, members have to make a transition from being an individual to being a member of a group. Some sort of warm up activity is good to do before a meeting starts. By doing an activity which creates a feeling of joining together, it helps everyone move into the process of thinking as a group, not as an individual.

The beginning of the meeting is crucial. It is the launching point for the whole energy of the meeting. Many groups use this time to do personal check ins. While this sort of sharing is a good idea, it can really effect the energy of the meeting, and somebody with a real personal problem can really effect the meeting energy in a negative way. This does not mean you should not share these things, but right before an important meeting might not be the best time. A meeting launch should be light and lively and get people energized. A group that starts into a meeting laughing and sharing will be have a better shot at handling agenda items with a positive attitude. Above all, make it FUN. If you start each meeting with something fun, people will come on time because they don’t want to miss the fun part of the meeting.

As you plan your facilitation and examine the agenda items, think about ways to present the items that are creative, interactive and fun. Be creative! For example, one way to transform the boring annual budget discussion is by giving everyone play money equal to an equal share of the budget dollars, and holding a mock, charity auction. People auction off budget items, with people spending their representative play money on the budget items they want to support. The total dollars in play money determines the budget for that item for the year.

Make it fun! Use story telling, games, role playing, drama, mystery and adventure regularly to break out of the routine rut of the meeting process. Your goal is to make meetings so interesting and fun that people look forward them and want to come. Sound like a lot of work? Absolutely. Is it worth it? Absolutely.

Some ideas for launches and fun:

- Sing your name and have the group sing it back to you.
- Break into small groups and do a mime skit about an agenda item.
- Become someone else, and mime it and have people guess.
- Sing and dance the song, the hokey pokey
- Create a large imaginary map on the floor and have everyone stand on the town they were born or grew up in.
- Do a weather report on how you are feeling. "sunny and warm, Cloudy with chance of grumpiness...."
- Have everyone place their middle names on slips of paper then pass them out and have folks try and guess which name belong to whom.
- Do a role play about an agenda item, with people playing positions. Exagarate the positions.
- Dress up in costume and make a story about the history of an agenda item.
- Make a board game for the agenda item and have people play it.
- Give an appreciation of something or someone.
- Tell about your hope for the community. " I want our community to be a place where...."
- Tell about your wish for the world. "If I were in charge of the world...."
- Have everyone write something about themselves that no one in the group knows about and might be a surprise, then read them and try to guess who it is.
- Share your favorite food, leisure activities, most embarrassing moment, childhood story, most influential person.
- Do a popup survey. Ask a question and have people stand if they answer yes. " Watch star trek, Oldest in the family, come from a family with more than 4 siblings, like chocolate, allergic to cats, played organized sports in high school, ..."

Resource: *Games Trainers Play: Experiential Learning Exercises*.; *More Games Trainers Play* Edward E. Scannel and John Newstrom 1981 McGraw Hill. Lots of good ideas for meeting openers and games to play in meetings.

Praise! Praise! Praise!

Praise people twice as much as your criticize. Never let any good deed or action go unheralded in the group. Say thank you publicly at every meeting. Recognize the value of people’s contributions at the beginning or within the meeting. It’s cheap psychology, and it works wonders. One of the best ways to boost group morale and keep it high, is to notice peoples work and praise it regularly.

Other meeting roles

Most groups use a combination of roles during a meeting. A role is a specific job, such as facilitator or note taker. When you create process roles be sure to discuss and write down the duties and expectations of each role. Some example roles are:

- Facilitator. Guides the meeting process.
- Scribe. Takes notes. Often rotated.
- Vibes watcher. Looks for feelings such as anger or frustration. Monitors how group is treating individuals.
- Turn keeper. Keeps track of the order people indicated they want to participate.
- Time keeper. Keeps track of how much time has been spent on an issue. Advises group when time allotted for an agenda item is up.

- Door keeper. Sits near the door and fills in late comers with the current status of the meeting and what has been discussed so far.

Setting a clear meeting agenda

After facilitation, the next most important meeting process is to outline a clear agenda. Put the agenda on a chalkboard at the meeting so everyone can see it. Let members know what is on the agenda before the meeting.

Write out each agenda item as a goal or an action. Rather than writing down "discuss budget" as an agenda item, analyze the goal for the item. Write it as a specific task that needs doing such as: "define budget categories and develop tentative amounts in each category". Making a task focused agenda helps to organize the thinking of the participants and makes it very clear exactly what is being done or asked for.

Be sure to identify the type of each item, is it a discussion, a brainstorm for ideas, or a decision? Provide background information with the item so people know WHY this is on the agenda.

One common problem is prioritizing the agenda. Sometimes there are so many things to deal with that meetings may take hours and hours. As a group, Scrutinize each item to ensure it is something the large group should be dealing with. Can a small group be entrusted to make the decision on this item? One idea is for the facilitator to set a time limit for discussion of each issue and then defer further action to a sub-group or another meeting. In this case when the time limit is reached the facilitator explicitly asks permission to continue, with the knowledge that other items later on the agenda might not get dealt with.

Identify resources for each agenda item. Is there a committee or person who knows about this agenda item? Talk with them and assign them the task of introducing the issue and provide background information.

Setting the flow of the meeting

Stack the agenda so there is a mix between short, easy-to-deal-with items and more complex items. Do some easy items on the agenda first to get warmed up and a build a sense of accomplishment. Watch the vibes. Take breaks when people seem restless or lethargic. Think about how to use breaks in the flow. For example, sometimes a break allows people to informally talk with each other about an issue and this can be exactly what is needed before the group can move forward. If an issue is going around and around between three or four people, call a break and encourage those people to eat some food and talk to each other about their issues. Breaks are very important to keep the energy level high. Some groups do physical activity at breaks, such a yoga, a dance or go out and do a work party effort to get the blood flowing again.

Getting started with brainstorming

One way to begin approaching the discussion of a particular topic is the free-form brainstorm. In this process each member of the group calls out an idea while one person (or two) writes on a blackboard or a large sheet of paper exactly what is said. By writing the information down, people can easily see and refer to it. If it is your intention to categorize ideas later, ideas can be written on index cards or yellow stickies, one idea per card, so they can be easily grouped without being rewritten. The value of brainstorming is that people will hear or see something that will trigger an idea. A synergy builds and ideas come rushing out, sometimes faster than they can be recorded. If you are leading this exercise, try to keep track of non-participants and make it a point to call on them for their ideas. Some people need to be asked. One way to do this is when the ideas slow down, do a round robin, asking each person in turn for an idea. If they have no new ideas, they can pass.

Before you get started clearly define the brainstorming subject. It can be helpful to address the subject as a question such as Why, How or What. You can either have group members just call out ideas as they come, take turns with hands raised, or go in turn in a round robin, where each person gets called on in order around the circle. One technique is to break into smaller groups and have some time to think and write down ideas before sharing with the large group. Be sure the recorders are writing down the ideas as they are contributed, and give them time to do it correctly. If the recorder is getting bogged down, use two recorders.

The critical part of doing this well is to not judge or categorize ideas in any way at first. Just write them as them come. Encourage everyone to contribute, especially "piggy backing" - building on the ideas of others. The goal is to get as many ideas as possible. Try to limit discussion or judgment, especially criticism. It may take some practice for the group to loosen up and let the ideas flow. Some groups do a warm up exercise such as asking for favorite dishes, or some other subject that will elicit responses and thinking.

Tip. Write ideas on cards or yellow stickies. Once all the ideas are listed they can be easily sorted, categorized, and moved around.

Using Proposals

Sometimes discussion about an agenda item can be jump started by using a proposal. An effective proposal gives every member as complete a picture of the issue as possible, without being more than one page. Some elements to include:

- An overview which describes why this item is important and worth group time.
- Goals you want the issue to achieve.
- A description which details what the item is about and its history.
- A list of pro’s and con’s.

Once a proposal is introduced (and ideally it should be handed out well before the meeting so people have enough time to think about it), a listing of issues and concerns can be brainstormed and worked through, discussion can happen about the issues and concerns, and a new, modified proposal can be drafted. Once sufficient discussion has occurred you may want to generate several alternative proposals and see if any of them work for the group. Often, by combining elements of multiple proposals, the end result is found.

Sometimes starting a discussion with a proposal can lead the group astray by starting at a particular place which may exclude other ideas or options. It can be helpful to introduce a starting proposal as just a starting place to get discussion going on the issue, rather than finished thinking about the issue.

As discussion on a subject is winding down, concerns have been aired and discussed, call for a proposal. It may be useful to have a break after the discussion to let people mingle more, then after the break call for proposals for consideration.

Giving everyone a voice

Each group defines how members will participate and have their ideas heard. Smaller groups can use a round robin in which each member is given the opportunity to speak in turn. Some groups use a talking stick or some other object to symbolize who has the floor. As the number of people in a meeting increases beyond twenty, maintaining continuity in a discussion becomes difficult when people are processing and sharing different types of information. Several groups use colored cards to signify different kinds of input such as green for "I have information about that," or red for "stop the process."

Sometimes a small handful of members may dominate discussions. Some people are just more verbal than others, or may be passionate about the issue, or be controllers. When this happens the group may not be getting the full picture nor benefiting from the experiences of the whole. If this continually happens within a group it should be noted and remedied. One way is for the facilitator to identify verbal members and then make a point of asking for input from others. For example the facilitator could say: " Mary, you’ve had quite a bit to say about this and maybe we should hear from some others. Jim, I haven’t heard what you think about this yet. Would you like to share your thoughts with us?" Another way of getting all the voices heard is to break up into small groups and then have each group do a brief report.

Some issues may require significant time for discussion. The stress of making life-changing decisions, and personally risky compromises in order to move towards an abstract goal deserves lots of time for listening. Sometimes when a person goes on and on about an issue its not really about the issue at all but about control, and compromise and fear and personal expression of all the other emotions that get tied up in working with and trusting a group.

What about people who are not at the meeting?

Not every one will attend every single meeting. Informing everyone in the group in advance what the meeting agenda is and what decisions are to be considered will help members decide their priorities. If someone who has important information or strong feelings does not know about the meeting and cannot attend they may feel left out. In some groups if members don't attend a meeting, or submit a written opinion, they have given up their voice in the decision. Other communities contact absent members for approval of any decisions. Make an agreement about how to handle participation from people who do not attend a meeting. It can be very frustrating to hold up a decision because one or more people missed the meeting where all the information about their concerns was discussed and dealt with. Decide how many people must be present to constitute a quorum. Establish this in your bylaws or other written agreements.

When should a decision be reopened?

It happens occasionally that a decision made on one day, needs to change on another day. Sometimes new ideas or information come up that makes reopening a decision a good idea. Reopening decisions can use a lot a group time to rehash the same issues as before and so having some agreement about how to reopen decisions is helpful. Some communities allow for an appeal of a decision if a certain number of people approve of bringing up the issue again. For example, if 5 members approve adding a change to a decision, then the decision is brought up again to discuss the change. Some communities use the board of directors or a special committee to hear and evaluate proposals for reopening decisions, with approval of these small groups required before the decision is reopened to the larger community decision process.

Be careful about reopening decisions for people who do not attend meetings. Rehashing the same discussions over again for the benefit of one person sets up a situation that is ripe for frustration, especially if the same individual is missing meetings and holding up the rest of the group.

Getting input from large groups

The cooperative process frequently requires giving information and getting input from everyone in the group. In large groups this can take considerable time, and even small groups can take an inordinate amount of time to hear everyone. There are several alternative ways to get peoples two cents worth without tying up the whole group for several hours.

A very simple way to deal with large groups is to break them up into smaller groups. This is especially helpful for discussions where you want people to talk with each other. Then have one person from each small group report on their discussion when the large group reconvenes. You can break groups randomly or let people choose which group they want to talk with.

One of the first ways to lighten the meeting load is to create ways outside of meeting time to gather peoples opinions. For example, a carefully worded paper questionnaire can quickly gather trends. Remember to number the questions so that when a small group collates the responses you can quickly tally by number. Using multiple choice questions where possible will make it easier to collate than essay questions. Another way is to hold "discussion circles" to talk about an issue. This is a great activity over dinner or some other informal atmosphere.

Once you have brainstormed a list of ideas, sometimes you need to sort through them to find the most important. One way to quickly prioritize a list is to print the list and give everyone a set of stickers and let them place stickers next to the items that they find most important. For example, when prioritizing a list of 60 items for the commonhouse, give people 15 stickers and let them put up to 3 stickers on any one item. By allowing multiple "votes" for a single item you can gauge the personal importance level of any given item. If you do this on paper as homework, be sure to number the list so a committee can easily tally the results.

Another way of gathering input quickly is the two cents method. Give every person in the group two pennies and place a pot or other container in the middle of the group. The facilitator asks who wants to speak in the first round and as people raise their hands and the facilitator recognizes the first six or so. Then to speak, a person pitches a penny into the pot which buys them 1 minute of group time. You only get to pitch one penny in a round, and once your pennies are gone, you don’t another chance to speak until all the pennies are spent. If a person asks a question and someone else has the answer, anyone in the group can pay one of their pennies for the answer but if no one wants to hear the answer, and no one pays a penny, the question goes unanswered. Some groups allow members to pass their pennies to those who are broke and still have something to say, and others don’t, making the more verbose have to carefully dole out their words. Once a round is done, and everyone has spoken, the facilitator calls for another round until, all the pennies are spent, or until no one raises their hand.

One of the key skills of facilitation, which is frequently overlooked, is recognizing when a topic should be sent to a small group. It is a very large waste of human talent to have thirty adults spend an hour sitting through a discussion that only four or five people are involved in and care about. One way to gauge this is to ask the group how many wish to continue the discussion. If only a few hands go up, and if the topic can be deferred, create a task force or action group and give them the task of presenting a proposal at the next meeting.

Often it can be helpful to test a proposal to see how individuals in the group feel about it. One way to quickly evaluate an issue is to do a straw poll. State the issue as a yes or no question and have people respond by holding up a finger. One finger means yes, two fingers means I can’t live with it just yet but its close , three fingers means I have something the whole group needs to hear about this proposal and thumbs down means strongly opposed. This straw poll can tell the facilitator in less then a minute, where the group is on any particular proposal.

Sometimes you have to make some fast decisions involving people who live offsite. One way to quickly poll a group is to set up a voice mail system. Many local phone carriers offer voice mail at very little cost and some even have customizable mailboxes which can respond to input such as "press star for yes, Press pound for no". You can change the message daily and have members call .in to hear the "crisis of the day".

Meeting formats

In addition to large group settings you should experiment around with other ways to hold meetings. For example breaking a large group into smaller groups which work independently then report back to the large group is a good way to generate ideas and discussion quickly.

Another idea is to create stations, where a large group breaks into smaller groups and works on one activity for awhile, then moves to another activity. For example, in a planning process you could have one table for parking, one for the barn, one for the housing, one for gardens and have people rotate from table to table.

Some groups use a decision board to generate meetings. An issue is published on a bulletin board, with a time and place for a meeting. Whoever is interested in the issue shows up at the meeting and the decision is made there.

"Fish bowling" is a way to get people who feel strongly about an issue talking. 4-6 people sit in the middle of the larger group, a circle within a circle. They each make their point, and there may be discussion. When someone in the center feels they have been heard, they move to the outer circle and someone else takes their place.

Many groups use colored cards. A card is raised to signify a contribution. The organizational idea is that people in large groups are in different places in what they need. Some people may have questions, some may have opinions to share, some may be ready to decide, some may have answers or information to share. The colored card system is best used to create a structure for giving input.

Maintaining group memory

Document all decisions. Minutes or notes of meetings are the group's memory, and every effort should be made to keep them accurate and up to date. In the case of many legal forms, minutes of meetings are a requirement. If you do not keep records of your decisions, you will very likely have to make the decision again later. If you have phone conversations with government planning or permitting agencies, write down what was said, by whom, and on what date. Minutes and records should be available in some form to every member, or posted in the meeting space so they can be read. It is a good idea to read the decisions made and action items assigned at the end of the meeting so any corrections can be made while the discussion is still fresh in everyone’s mind.

The action minutes format works well. Divide a paper into two columns, with the left column taking up 1/3 the page and the right column using the remaining 2/3rds. The agenda item goes into the left column, discussion notes goes into the right column. In the left column under the agenda item goes the names of people who have action items and any dates for completion of those items. If a decision is made, write the word Decision on the left side, and the full text of the decision on the right. This system makes it very easy to scan a large number of minutes for information and decisions.

Recognizing human factors

There will be some long and tedious meetings. Recognize that humans have limits, so set aside time for breaks. Pay attention to the human factors and if you see people drifting, call for a break. One group routinely breaks up the meeting time to go outside and do physical work party efforts such as chopping wood. The exercise helps recharge the participants and they come back into the meeting with renewed energy and often new ideas and perspectives.

Be sure to take into account the physical needs of the group. People can get irritable when their blood sugar is low. Have some juice or snacks available and break at least once every ninety minutes to stretch and get the blood flowing. A good rule of thumb is: the harder the chair, the more frequent the air. That is to say, if you have metal folding chairs, get people on their feet more often.

Sometimes the meeting process is counterproductive and the group enthusiasm is low because everyone wants to be outside in the sunshine. Learn to gauge your meetings and get a sense of the group dynamic. If many people are feeling low energy, its probably not a good time to tackle a large complex issue. There is seasonal variation as well. Winter, with its short days and long dark nights, is a common season for depression and low spirits. Remember community is a long term project so sometimes issues can be postponed until they are more pressing.

Ending the meeting

Have some sort of end of meeting regrouping, especially after heavy meetings. Having a closing can be a bringing together again. A ‘Check out" can gather feedback for how people feel, clear the air, or critique the meeting process. Having a check out at each meeting brings a closure and signals the end of the meeting.

Evaluate your meetings on a regular basis. What is working? What is not?

Random tips

- When you have a file full of meeting minutes, organize them by date, then in red felt tip marker number the pages consecutively at the top. This way it is easy to see which "pages" are missing or out of order.
- Most of what you will want from old minutes is to check on an agreement or decision that was made. Break out the decisions made from the minutes and assign someone to keep them in a separate document as a running file or mark the decisions with highlighter pen to make them easy to find.
- If you do round robins, pass along a watch with a second hand and set a limit to comments.
- Use crunch points, times when meetings are really intense, as tools to analyze what went well and what didn’t and what to improve the next time.

- Include everyone in the things where group inclusion is best. This is not every detail.
- Write the issue being discussed on a blackboard or on paper so meeting participants can see it and keep track of what is being discussed.
- Deal with business issues and personal and interpersonal issues in separate meeting sessions.
- Don’t let the end of the meeting deadline push the group into a poor decision. The "lets just make the decision and get out of here" mentality often results in a poor decision. It’s better to take an extended break.