



A series for people working together in groups

Effective Meetings Management

Viviane Simon-Brown

In 1992, the Oregon Business Council surveyed 1,361 Oregonians about what they valued most—and liked least—about living in Oregon. Of course, no surprise, we love our tall trees, pristine beaches, and towering mountains. What do we dislike the most? Attending meetings, especially public meetings!

Since meetings are a required part of our lives, let's see if we can make them better. After all, if your meetings are more effective, you'll probably have more time to do what you really want to do, such as visit tall trees, pristine beaches, and towering mountains.

Fortunately, meetings don't have to be bad. Bad meetings are nothing more than bad habits!

FAIR-OPEN-HONEST MEETINGS

For meetings to be effective, the process must be fair, open, and honest. Fair, open, and honest? It sounds like something from the book *Everything I Ever Needed to Know I Learned in Kindergarten*. But think about what those words really mean for your meetings.

IN THIS PUBLICATION YOU'LL LEARN:

- The fair-open-honest triangle
- Eleven easy ways to improve your meetings
- The roles and responsibilities for your group's meetings
- The importance of documenting your agreements



OREGON STATE UNIVERSITY EXTENSION SERVICE

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ABOUT THIS SERIES

“In no country in the world has the principle of association been more successfully used, or applied to a greater multitude of objects, than in America.”

Alexis de Tocqueville
Democracy in America

De Tocqueville wrote this observation in 1831. Some things haven't changed.

We all belong to groups. De Tocqueville called them “associations,” but yours could be a council, committee, commission, delegation, alliance, club, lodge, union, partnership, organization, or coalition. It could be voluntary or professional, advisory or governing, official or casual.

Whatever it's called, and however it's con-figured, a group is made up of people working together on what's important to them. The publications in this series (see page 12 for a list) are designed to help members of a group be more effective. Do they work? We think so. After all, we work together in groups too.

Fair

Being fair means several things. For example:

- Providing opportunities for people to participate in ways that work well for them. For instance, you can schedule meetings at convenient times, acknowledging that the high school playoffs may be more important than your meeting.
- Being prepared to apply ground rules without bias
- Accommodating special access needs
- Making room for different learning and communication styles so everyone has a chance to participate
- Making sure the people who are affected by your group's decisions help make those decisions

Open

We have open public meetings in Oregon. It's the law. People need to be able to witness meetings, but too often this law has meant that anyone who wants to sit through a laboriously dull meeting, can. Check to find out whether your group is required to have open meetings.

The true spirit of open meetings is more, however. True openness means:

- The process is straightforward, understandable, and explained, both verbally and in writing.
- The only agenda is the one hanging on the wall.
- Participants understand their roles in the process.
- There is a safe physical and intellectual environment for the exchange of ideas, with agreed-upon and enforced ground rules to protect people and ideas.

Honest

Honest means telling the truth. Here are some examples of honesty within the context of meetings:

- Posting desired meeting outcomes
- Eliminating hidden agendas; topics are addressed openly
- Taking everyone's input at face value
- Not trying to fool citizens by asking for input when decisions already have been made

- Acknowledging that some issues—e.g., abortion, gun control, and spotted owls—are so value-laden that you’ll probably never reach common ground, so your group focuses its efforts on topics you can agree on
- Not glossing over the amount of time people are expected to commit to the group’s efforts
- Not promising what you can’t deliver, whether it’s a report or a legislative policy

Fair. Open. Honest. Can it really be that simple? Actually, no. The trick is to make sure all three principles are in place and in balance, something like an equilateral triangle (Figure 1). If one side is missing, the process doesn’t work. For example, you could say to a fellow group member, “Fred, I want to be totally honest with you. The fact that you’re tall makes it impossible for me to work with you.” It’s honest. It’s open too. But fair? No way!

This fair-open-honest concept is easy to understand and takes a lifetime to implement. It’s worth the effort.

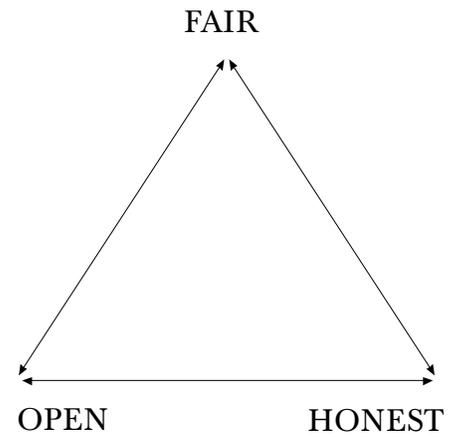


Figure 1.—All three principles should be in place and in balance, something like an equilateral triangle.

ELEVEN EASY WAYS TO IMPROVE YOUR MEETINGS

Although the fair-open-honest principle sounds great, most of us need more practical suggestions to make our meetings go more smoothly. Try the following 11 ways to improve your meetings:

1. Have an agenda and use it.

A written agenda can make a huge difference in the success of your meeting, especially if you use it. Here are some situations that highlight this point:

“So Jim, you’ve asked me to come to this meeting of yours on Friday. What is it you want to accomplish?” (Maybe this meeting isn’t for you.)

“Denise, I’m sending you a memo about an upcoming meeting of our watershed coalition, but I wanted to talk to you first. I’d sure like to have you there. If all goes as planned, by the end of the meeting, we’ll have identified the evaluation criteria for the grant proposal, and we’ll have selected the people who’ll present our info to the County Commissioners.” (Wouldn’t you want to go to this meeting?)

“Carlos just brought up a really important issue. We don’t have it on the agenda, but I think we have to address it before we can make a decision on the Christmas tree project. Can we adjust the agenda?” (Agendas certainly can be rearranged to accommodate new issues and unforeseen discussions.)

2. Use a meeting manager.

You have several options here. The idea is to have people with good meeting management skills run your meetings. Meeting managers are like traffic cops. They guide the process, not the content. And like the police, often their very presence encourages good behavior. Here's an example of good meeting management:

“Wow, we're finishing right on time. All we have to do is confirm our next meeting time and place, and build the agenda. Ginny mentioned earlier that we should discuss the Christmas party at our next meeting. What else needs to be on the agenda?” (Doesn't this sound like a great way to wind up a meeting?)

Here are some things your meeting manager can say to help the group along:

“We agreed to spend 10 minutes on this topic. We're running out of time. Can someone summarize the key points?”

“OK. Joe has stated the problem as he sees it. Let's go around the room and see if others see it the same way.”

“Let's hear from the folks who haven't had a chance to say something yet.”

For your regular meetings, try rotating the meeting manager role among group members who have these skills. It's amazing how courteous and effective groups become when members realize they're individually responsible for the success of the meeting. Rotating the meeting manager position also helps build group solidarity.

Having the chairperson “run” the meeting isn't necessarily a good idea. The chairperson is integrally involved in the “content” of the group—what you're trying to accomplish. Being simultaneously responsible for the “process” usually is more than he or she can handle.

You might consider using an outside facilitator as your meeting manager. Good outside facilitators are worth their weight in gold. You might be able to “borrow” one from a partner group, or you might choose to hire a professional.

A facilitator really comes in handy when bad habits threaten to overwhelm the group, when major differences of opinion arise, when an impasse is reached and the group needs a jump-start, or when you're actively involved in strategic planning. Be careful, however, not to come to depend on a facilitator for the success of your meetings—that's your responsibility.

3. Have agreed-upon ground rules for behavior—and use them.

You probably don't play a new game without learning the rules. To minimize hurt feelings, misunderstandings, and wasted time, decide up front what your group's operating principles will be. One quick way to get to the basics is to ask each member to finish this sentence, "At this meeting, all rules can be broken except this one. . . ." Post these rules at every meeting.

Here are some situations where rules come in handy:

"Hey, Jerry and Kim, we agreed to respect divergent opinions at this meeting. Please stop arguing."

"Hold on! We all agreed not to evaluate ideas at this time. Let's back up."

"We agreed to hold all calls for the next hour while we work on this problem" (while gazing at Bill, who's just picked up his cell phone).

4. Use wall notes for group memory.

Wall notes—chalkboards, butcher paper, flipcharts—are great visual tools. They help group members focus more on the issues than on each other. People can keep on track. To make it easier to use wall notes, set up your meeting room in a "U" shape with the wall note space at the open end of the U.

Here are some ways wall notes can help your group:

"Shawna, can you summarize what you just said so we can put it on the chart?"

"Bob, didn't you already make that point? How is what you just said different from what's already on the chart?" (This technique can really cut down on "air time.")

"Yes, Alice, your comment has been recorded. It's right here" (pointing to chart). "Did we get it right?"

"Great! Derek just volunteered to call the Governor's office. Put his name on the flipchart next to that task. Thanks!"

5. Accommodate different learning and communication styles.

People perceive and take in information in different ways. Some people process information verbally, and most meetings cater to these people.

Other people don't say a word at meetings. In the past, it was assumed that these people were shy or didn't have anything to contribute. Now we know this assumption is wrong. Approximately half of the United States population is comprised of people who process information internally, mulling it over before speaking.

With just minor changes to the meeting structure, you can create opportunities for everyone to participate. Try these methods:

Try nonverbal communication.

"We've spent a lot of time talking around this issue. How about everybody taking 5 minutes to write down the situation as they see it."

"I know this sounds a bit weird, but we've been going around in circles on this issue for a long time. How about approaching it in a different way? Let's divide into groups and draw a picture of what a solution could look like."

Use small groups.

"We're ready to start strategizing solutions. Let's divide into small groups. Do you want to count off or just choose your own group?"

Allow time when possible for reflection.

"Now that we're clear about the problem, let's give ourselves some time to mull over some possible solutions. If everyone gets their ideas to me by Wednesday afternoon, I'll put them all together and get them to your office by the following Monday."

6. Start on time so you can finish on time.

7. Know how decisions will be made.

EC 1509 focuses on decision making, but it's important enough to be mentioned more than once. Whatever your group's decision-making process, make sure everyone knows and understands it. Here are some examples of being clear about the decision making process:

"OK, remember we agreed that since this is Orasa's project, she'll make the final decision."

"Our decision-making process is consensus minus one. Everyone except Bart is comfortable with the proposal. Using consensus minus one, we can go ahead with the project."

See EC 1509 for a detailed discussion of decision making.

8. Go slow to go fast.

Has the following situation ever happened in your group? You're brainstorming solutions when, all of a sudden, part of the group jumps on one idea, obviously deciding it's the one they want, effectively stopping the whole brainstorming process. We often race to a solution without being clear about what the problem really is.

Ernie McDonald, the father of meeting management in Oregon, coined the phrase, "Go slow to go fast." It's worth trying. Here are some ways to put this principle into practice:

Check understandings before moving on.

"I don't hear any complaints about Scott's suggestion, but just to be sure, does anyone have serious problems with his suggestion? Great, let's move ahead."

Define the problem.

"Whoa! We're rushing to solve this 'problem,' but I'm not sure we understand what the 'problem' really is. Let's go around the room to hear everyone's 'read' on it."

Pay attention to the group's emotional level.

"Whoa! Let's cool down a bit. Let's take a 10-minute break."

Create time for rest and reflection.

"We seem to be floundering here. How about a 15-minute break? Then we can refocus our energy."

9. Make sure everything you do works directly toward your mission.

Unless your group structure is an organic network (see EC 1507, Choosing Your Group's Structure, Mission, and Goals), think twice before spinning off onto new projects and expanding your mission. Usually, volunteer committees barely have enough time to get the essentials done. Think about what you're supposed to be focusing your time and energy on.

For example:

"You know, Billy Bob's just had a great idea. Since we agree it doesn't fit our mission, how about we share it with the Red Cross folks? I'll bet they'd love it!"



Usually, volunteer committees barely have enough time to get the essentials done. Think about what you're supposed to be focusing your time and energy on.

“What are we trying to accomplish here? Sure sounds like we’re not clear about our mission. Let’s back up a bit.”

“Buying the old bowling alley sounds intriguing, Janey, but I don’t get how it fits with our mission. Help me out.”

10. Document your agreements.

Does this scenario sound familiar? You’ve been hashing out a complex situation for an inordinate amount of time, the meeting has gone on far too long, and everyone’s worn down. Somebody jumps up and says, “Hey, all we need to do is. . .” Everyone agrees it’s a great idea, grabs their stuff and dashes out of the room. Later, nobody can agree on what it was they agreed to. Taking time to “agree on what you’re agreeing to” is worth it.

“Let’s make sure we know what we’re agreeing to. Can someone restate their understanding of the solution? Let’s get that down on the flipchart. Wait, before you dash out, do we have it correctly written down?”

If it’s a major decision, you may even want to go a step further:

“To ensure we’ve got the wording exactly right, please come up and put your initials on this.”

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Figure 2.—Evaluate a meeting by listing the things people liked and the things they would like to change.

11. Evaluate, evaluate, evaluate!

Your group regularly measures its progress in attaining its content goals. (See EC 1507, Choosing Your Group’s Structure, Mission, and Goals.) You also should evaluate your process, especially when you’re changing to a new way of conducting meetings. After all, how will you know that the meeting’s been successful? Here are three quick ways to evaluate how you’re doing:

- 3 minutes: One person volunteers to record. On a flipchart, record what the group liked about the meeting and what they would like to change. Draw a line down the middle of the sheet, and draw a “+” on one side and a triangle on the other. (The triangle is scientific shorthand for change.) Then record people’s comments in each column (Figure 2).
- 1 minute: Ask each member to do the same exercise individually. Have one person collect and tabulate results.
- 3 minutes: Hang a flipchart at the exit of the room. As people leave, have them mark on a line how successful the meeting was for them (Figure 3).

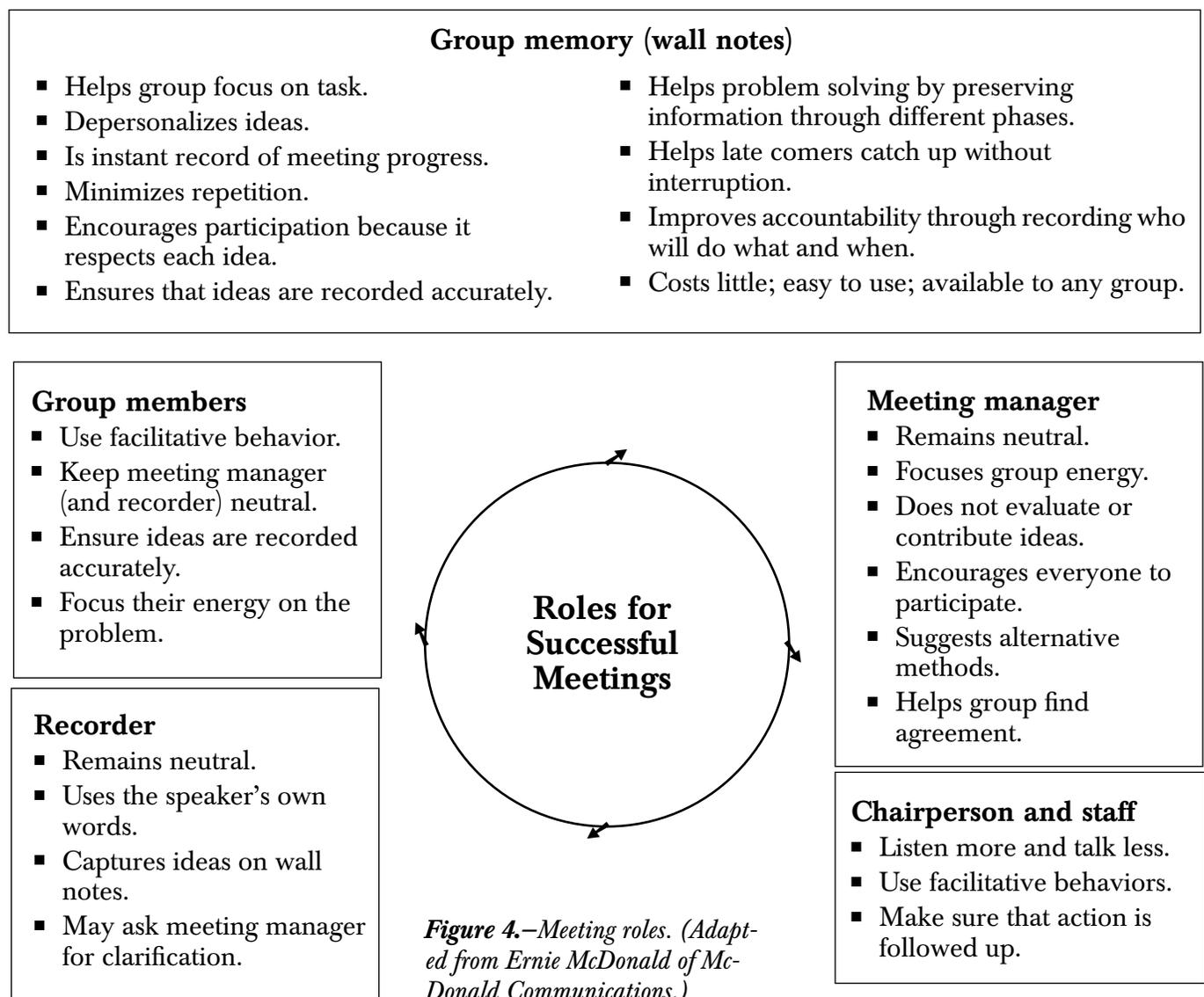
+								- content
+								- process

Figure 3.—Have people mark on a line how successful the meeting was for them.

ROLES AND RESPONSIBILITIES FOR SUCCESSFUL MEETINGS

Making your meetings successful is your responsibility. It is not the chairperson’s job nor the high-paid outside facilitator’s job; it’s yours—the participants. The days of sitting back and reading your mail while someone else “runs” the meeting and makes the decisions are over! Shared decision making means shared meeting obligations.

The process roles and responsibilities are straightforward (Figure 4). None of the jobs is particularly difficult. Now imagine being in a meeting where everyone does his or her job. Doesn’t that look good? It wouldn’t take much to make it happen.



SUMMARY/SELF REVIEW

The following lists summarize the key points in this publication. You can use them to evaluate your group's meetings and to identify areas for improvement.

Are your meetings fair-open-honest?

- Are your meetings scheduled at convenient times?
- Does your group accommodate special access needs?
- Do you involve the people who will be affected by your group's decisions?
- Do you offer a variety of formats—verbal and nonverbal—to ensure full participation?
- Is the meeting process straightforward and understandable to participants and observers?
- Is your group required to comply with Oregon's open meeting law?
- Do participants understand their role?
- Does the meeting feel like a safe place to exchange ideas?
- Does your group have ground rules for behavior—and use them?
- Are meeting agendas and expected outcomes posted so all can see them?

- Is everyone's input taken at face value (or are people trying to read more into it than was said?)
- Are people asked to give input, and is that input used?
- Are time commitments clear?
- Does your group deliver what you promise?

Ways to improve your meetings

- Does your group start its meetings on time?
- Does your group have a posted agenda? Do you use it?
- Do you use a meeting manager for your regular meetings? Do you rotate this responsibility?
- When your group has a crisis, do you bring in an outside facilitator to help you get back on track?
- Does your group have agreed-upon ground rules for behavior? Are they posted? Do you use them?
- Does your group consistently use wall notes (for example, flipcharts or a chalkboard) that everyone can see?
- Does your group accommodate different learning and communication styles?

- Does your group fully define the problem before rushing to solve it?
- Do you ever write out solutions rather than talk about them?
- Do you use small groups for brainstorming and problem solving?
- How does your group make decisions?
- How do you know that a decision has been made?
- Are your decisions written down where all can see them?
- Does your group call an unscheduled break to allow emotions to cool, or time to think?
- Do all of your group's decisions move you closer to achieving your mission?
- How does your group evaluate the meeting process?

Roles and responsibilities

- Do you know what role you play in the meeting process?
- Do you contribute to the success of the meeting?
- What steps are you going to recommend to your group to improve your meetings?



EXERCISES

Dealing with difficult participants

You can do this exercise on your own in about 10 minutes.

Every group has at least one member whose behavior sometimes slows progress. This person can be a talker who never seems to pause, or someone who waits until a decision is made, then drops the bombshell, or . . . I'm sure you can come up with your own scenarios.

In this exercise, your job is to think up at least three ways to pleasantly deal with the situation. Keep in mind the fair-open-honest philosophy. Then, the next time he or she strikes, you're ready to go into action!

Remember, every group member is responsible for helping the group move forward. Don't wait for the meeting manager to take care of it.

Keeping your meeting focused

Do this exercise at one of your group meetings. It should take about 10 minutes.

If you're intrigued about these meeting management ideas but aren't ready to take on a whole meeting, here's a low-risk exercise to get your feet wet. Talk to the meeting manager first so he or she will know what's going on.

At your next meeting, as soon as everyone's settled and the meeting is ready to start, grab a marking pen, walk up to a flipchart, and ask the group to help you answer this question: "What will make this meeting successful?" Write down their responses. Post the paper on the wall and sit down.

Now, during the meeting, focus on helping achieve these successes. At the end of the meeting, take 3 minutes to refer back to the chart and check off the items the group has accomplished. Are you surprised how easy it was to take these steps?

RESOURCES

Training

The Family Community Leadership (FCL) program of the OSU Extension Service. Check with your county OSU Extension Service office.

CISPUS Inter-Agency Public Meetings Training. If you work for a federal or state natural resource agency, call Susan Saul at 503-231-6121 about the training schedule.

The Chandler Center for Community Leadership (phone: 541-388-8361) contracts experienced facilitators for community groups.

Management Resources (phone: 503-287-9345) provides advanced training for experienced facilitators.

Information

The Fifth Discipline, by P. Senge (Doubleday, New York, 1990). ISBN: 0-385-26094-6

The Fifth Discipline Fieldbook, by P. Senge (Doubleday, New York, 1994). ISBN: 0-385-47256-0

How to Make Meetings Work, by M. Doyle and D. Straus (The Berkley Publishing Group, New York, 1985).

The Skilled Facilitator, by R. Schwartz (1994). ISBN: 1-55542-638-7

We've Got to Start Meeting Like This! by R. Mosvick and R. Nelson. ISBN: 1-57112-069-6

MOVING FORWARD—THE NEXT STEPS

On your own, use the lines below to fill in steps, actions, thoughts, contacts, etc. you'll take to move yourself and your group ahead in improving meeting management skills.

1. _____

2. _____

3. _____



OTHER PUBLICATIONS IN THIS SERIES

Choosing your Group's Structure, Mission, and Goals, EC 1507, by V. Simon-Brown (April 1999). \$2.00

Creating Successful Partnerships, EC 1506, by P. Corcoran (April 1999). \$2.00

Dealing with Stumbling Blocks, EC 1511, by F. Conway (April 1999). \$2.00

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