**Effective Meetings: A Guide**

**Introduction**

More than half of all managers say that up to half the time spent in *meetings* is unproductive. This represents a major expense to Schools.

Effective meetings:

1. Have a defined objective that all participants know in advance.
2. Start on time; end on time or early
3. Take a minimum amount of time
4. Encourage meaningful participation
5. Achieve the meeting's objective
6. Result in an action plan

Many *meetings* are destined to be unproductive even before they begin. Only about one-third of participants are ever prepared for a meeting, although nearly everyone participating in them thinks this is vital. Less than half of all *meetings* start on time and most do not end on time. About half of all meetings fail to achieve their goals. Few managers ever learn how to run meetings. All this demonstrates sloppy management.

Better *meetings* are inextricably linked to better management. And, conversely, poor *meetings* not only waste people's time, they show up a company's weaknesses and make moderators and participants appear incompetent and unfit for management.

**Need the meeting?**

The first question is: Do you need the meeting? Make every meeting matter - or don't meet at all. Decide if a meeting is needed and invite only the necessary people.

Massive amounts of valuable time are wasted simply because managers think that face-time is important, or because they've become accustomed to a particular routine. E-mails are usually sufficient to give your team an update or a status report. But if you need instant feedback from all participants, then e-mail will not be as efficient as a face-to-face meeting.

To help decide if you should meet, ask yourself the following questions:

1. Can you state the purpose of your meeting?
   1. Do you want a decision?
   2. Do you want to generate ideas?
   3. Are you getting status reports?
   4. Are you communicating something?
   5. Are you making plans?
2. Is your meeting’s purpose worth the time and costs?
3. Will a meeting be more efficient and produce better results than sending e-mails or making phone calls?
4. Do you really want or need the participants’ input?
5. Are you really going to act on participant input?
6. Do you have the information you need for the meeting to be productive?
7. Will all participants have enough time to prepare for the meeting?
8. Are the participants going to be able to work together on the meeting’s issue(s)?

**Prepare for the meeting?**

To conduct *meetings* successfully, each participant must be prepared for the meeting. The following guidelines help increase a meeting's effectiveness:

1. Develop a written agenda for each meeting and distribute it to participants well before the meeting
2. Assign a clear starting time
3. Assign a stopping time for the meeting
4. Clearly state the meeting’s expected outcomes and objectives.
5. Invite only necessary participants
6. Determine the number of topics to be covered and the time to spend on each.
7. Assign an appropriate recorder, a person to take minutes
8. If you will not moderate the meeting, pick someone who understands objectives and can keep the discussion on track
9. Select an appropriate site, a productive environment
10. Do not schedule a meeting just because it is customary to do so

**Are You Ready to Meet?**

Be certain you can answer “Yes” to each of the following questions in advance of the meeting.

1. Is the meeting room configured appropriately for the meeting with sufficient chairs for all participants?
2. If using flipcharts in the meeting:
   1. Do you have sufficient flipcharts and paper?
   2. Do you have flipchart markers?
   3. Do you have masking tape (or self-sticking flipchart paper) to affix completed charts to the walls?
3. If presenting information using a laptop computer and overhead projector:
   1. Are all the presentation files installed and working on the computer?
   2. Do you have all the cables and extension cords required to make the laptop and overhead projector work properly?
   3. Have you tested the functioning of the laptop with the overhead projector?
4. If you are planning special activities in the meeting, do you have all the supplies to support these activities?
5. Have you planned how you will record meeting minutes, actions, and decisions?
   1. Who will take the minutes?
   2. How will minutes be recorded – by hand with note paper or on a laptop?
   3. Do you have the appropriate supplies for recording the minutes?
6. Have you planned how you will complete and distribute meeting minutes and handle any additional follow-up items?

**Follow Agenda**

Time is a precious resource; no one wants to waste time. Streamline the meeting as much as possible. Any time wasted in a meeting is multiplied by the number of people attending.

Everything that happens in a meeting should further the meeting’s objectives. If not, they are superfluous. To ensure you cover only what needs to be covered and you stick to relevant activities, you need to create an agenda. The agenda is what you will refer to in order to keep the meeting running on target and on time.

To prepare an agenda, consider the following factors:

* Priorities – what absolutely must be covered?
* Results – what do need to accomplish at the meeting?
* Participants – who needs to attend the meeting for it to be successful?
* Sequence – in what order will you cover the topics?
* Timing – how much time will spend on each topic?
* Date and Time – when will the meeting take place?
* Place – where will the meeting take place?

Once you have an agenda prepared, circulate it to the participants and get their feedback and input. Running a meeting is not a dictatorial role: Get their participation before you begin. There may be something important that a team member has to add. Maybe you have allotted too much, or too little, time for a particular item. There may even be some points you've included that have been settled already and can be taken off the discussion list.

If the meeting is being held to solve a problem, ask the participants to come prepared with a viable solution. If you are discussing an ongoing project, have each participant summarize his or her progress to date and circulate the reports among members.

Assigning a particular topic of discussion to various people is another great way to increase involvement and interest. On the agenda, indicate who will lead the discussion or presentation of each item.

Try to do as much work as possible before the meeting. This includes circulating reports for people to read beforehand and assigning smaller group meetings to discuss issues relevant to only certain people. Meeting Agenda Form can be found in Appendix 1.

**Run a Good Meeting**

Good meetings are products of good leadership. Move your meeting forward by keeping the discussion timely, useful, and relevant.

Stay on topic. If the conversation goes off track, refocus the group by saying something like: "Interesting, but I don't think we're advancing our goals here. If I could, I'd like to return to the agenda."

Stay on time. An important aspect of running effective meetings is insisting that everyone respects the time allotted.

* Start the meeting on time. Do not penalize those who arrive on time.
* Do not spend time recapping for latecomers
* Finish on time, or early. Only sloppy managers lead meetings that always end late.
* Show your colleagues that you respect their time by making sure a clock or timer is visible to all.
* Use your agenda as your time guide. When you notice that time is running out for a particular item, consider hurrying the discussion, pushing to a decision, deferring discussion until another time, or assigning it to a subcommittee for discussion.

Encourage all the participants to provide constructive input during the meeting without being embarrassed or insulted. Since the point of a meeting is two-way communication, it's crucial to get honest input from everyone. It's the meeting leader's responsibility to make sure everyone is heard. If certain people dominate the conversation, make a point of asking others for their ideas.

To build consensus or come to a group decision, avoid making your initial opinion too obvious. A leader can stifle useful discussion if everyone assumes the outcome is already determined. Also, avoid dismissing ideas immediately, even when you initially think they are terrible.

Keep your own notes and track decision points during the meeting. At the end of each agenda item, quickly summarize what was said, and ask people to confirm that it is a fair summary. Then make notes regarding follow-up. (This also signals that it is time to move on to the next agenda item.)

List all tasks that are generated at the meeting. Make a note of who is assigned to do what, and by when. Action items accomplished?

Close of the meeting, by quickly summarizing the next steps, an Action Plan that assigns tasks and includes a specific timeline for further steps toward the objectives. Inform appropriate people at the School what was decided at the meeting and what will happen next.

Keep the meeting group updated about how the Action Plan steps are proceeding. Have a system to keep track of what was decided and what assignments everyone agreed to take on so you can follow up and keep things moving.

**Make Sure the Meeting was Worth Attending**

It helps to end the meeting by asking everyone whether they thought the meeting was useful and, if not, what could be done better next time. Do a follow-up debriefing on your own to improve your meeting techniques. A formal method to evaluate the meeting is the Exit Survey (Appendix 2).

Finally, prepare the meeting summary. This will be forwarded to all participants and other stakeholders. It is a record of what was accomplished and who is responsible for what as the team moves forward. This is a very crucial part of effective meetings that often gets overlooked.

Include a written record of what transpired, along with a list of actions the individuals who agreed to perform them.

**Appendix 1: Meeting Agenda Form**

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| --- | --- | --- | --- |
| **MEETING AGENDA** | | | |
| **DATE**:\_ \_\_\_\_\_ | **START TIME**: \_\_\_\_\_  **END TIME:** \_\_\_\_\_ | **DURATION**: \_\_\_ | **PLACE**: \_\_\_\_ |
| **MEETING OBJECTIVE(S):**  **1. \_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **2. \_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **3. \_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **4. \_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | | | |

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| **Topic/Item** | **Time allocated (Minutes)** | **Objective (Number)** | **Topic Leader** |
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**Appendix 2: Meeting Exit Evaluation**

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| **MEETING: EXIT EVALUATION** | | | | | |
| Use the following rating scale to tell us **how well this meeting was run**. | | | | | |
|  | **1= Poor** | **2= Fair** | **3= Okay** | **4= Good** | **5= Excellent** |
| **Organization** – How well was the meeting run? |  |  |  |  |  |
| **Moderator**(s) – How effective was the moderator/meeting leader? |  |  |  |  |  |
| **Output** – How well did we achieve what we needed to achieve? |  |  |  |  |  |
| **Use of time** – How well did we use the time allotted? Start/Stop meeting on time? |  |  |  |  |  |
| **Participation** – How well did we make sure everyone was appropriately involved? |  |  |  |  |  |
| **Decision Making** – How well thought-out were our decisions? |  |  |  |  |  |
| **Action Plan/Next Steps** – How clear and doable are our action plan / next steps? |  |  |  |  |  |
| **Comments?/Questions?** – Are there any comments you would like to make about this meeting, the methods, or the processes you experienced? If so, please include them in the space below. | | | | | |

**This document a**dapted from **several sources, including:** [www.mindtools.com/CommSkll/RunningMeetings.htm](http://www.mindtools.com/CommSkll/RunningMeetings.htm); **Elsayed-Elkouly SM, Lazarus H. Why is a third of your time wasted in meetings? *J Management Development*. 1997;16(9):672-5;** Francisco JM. How to Create and Facilitate Meetings That Matter: Learn how to plan and run a successful meeting using crucial checklists. *Information Management Journal* November/December 2007:54-58.