Effective meetings

Not all meetings are efficient and enjoyable. However, with careful planning and management, they can be. When a meeting works well, it can generate great ideas and add enormous value to the work environment. This Information Sheet will look at ways to help make future meetings more effective through examining: the different types of meetings, meeting roles, presentations, group dynamics and the importance of an agenda.

What type of meeting is it?

Good meetings start with a clear purpose. The following categories are a guide to meeting types. NOTE: Some meetings can fall into more than one category.

- To inform
- To solve a problem
- To make a decision
- To learn
- To carry out legal business
- To support

Why have a meeting?

Now that the meeting has a clear purpose, there are other factors that need to be decided.

- Carefully examine your purpose and what aims will be dealt with during the meeting
- Consider the main factors arising. When does the meeting need to be held? Who needs to attend? How long does it need to be? What is hoped to be achieved? By being clear about what you want to achieve from a meeting, you can also decide exactly how necessary it is
- Decide what kind of meeting to have based on the purpose and factors above (eg formal, informal, one-to-one, AGM)

Meeting Roles

Sometimes meeting roles can be clear, whilst other times it can be difficult to decide who will chair, take minutes or host during the meeting. Here are some basic guidelines to different meeting roles to help to choose an appropriate candidate.

a) Chairing/ facilitating

This is a highly skilled role and takes practice and experience to be a successful chair/ facilitator. Effective chairing is key to making a meeting successful.

During the meeting

- *Allow time for introductions, particularly with new groups or if new people join existing groups.*
- Be sure everyone gets to participate. Delegate responsibilities and share work evenly. Make sure people understand their tasks.
- Keep the meeting lively and interactive. Avoid long presentations. When possible, distribute written reports ahead of time so they can be discussed (not read) during the meeting.
- If the meeting is going to run over ninety minutes or so, consider a brief break in the middle, or at an agreed time, perhaps with refreshments. Set a time to return and stick to it.
- When exploring ideas and making decisions in groups, consider alternatives to general discussions, to help give clear direction and keep the energy flowing. Perhaps you could try using some of the following techniques:

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Group Dynamics

a) Brainstorming: List as many ideas as possible, as quickly as possible – and don't stop to evaluate, discuss or criticise. It is surprising how many ideas can be generated and how even the most off-the-wall ideas can spark creative thinking and inspire something really useful.

b) Pairing off and Small groups*:* When people need to talk something through, breaking up into small groups or pairing off to take turns listening to each other is a good way to make sure everyone is heard. This is a useful step in dealing with a difficult issue, since people are more ready to listen once they have had a chance to speak their mind. Someone from each small group can then give a summary report on their discussion.

c) Round-robin reporting*:* Go around the group and ask each person to respond to the question or proposal at hand. This technique gets everyone's input and helps keep anyone from dominating a discussion. Another possibility is to get each person to write down several ideas, then go around the group and let each give one idea. This works best with groups of up to a dozen or so participants.

d) Straw polls*:* When faced with a list of options, straw polls provide an alternative to voting. Try giving each person two to four votes (depending on the length of the list and number of people) to distribute among the choices. This helps to get the sense of the group without forcing a decision and encourages people to express support for more than one idea. Eliminate ideas with little or no support, focusing more in-depth discussion on the remaining options.

e) Listing pros and cons*:* This is a good way to evaluate an idea and helps people see both sides of a proposal. Divide a flip chart page into "pros" and "cons" and let people list all the advantages and disadvantages they can think of.

b) Secretary

The secretary's job is taking the minutes during the meeting. It is helpful to look at minutes taken from previous meetings to get an idea of the desired format (as they can vary greatly). Also:

- Follow the agenda carefully when taking notes
- Make sure that the chairperson approves the minutes before distribution
- Write up and distribute the minutes as soon as possible after the meeting – this will encourage prompt action on issues raised
- Remember - the minutes should be clear to people who were absent from the meeting!
- Minutes should be kept brief and may even be written in note form

When choosing a secretary, pick someone with strong listening and documentation skills. The same person can be asked to be secretary at every meeting, or the role can alternate.

c) Host

Just as important as chairing and minute-taking is the host role. The host takes responsibility for booking the venue, refreshments, necessary equipment, gathering any necessary papers, welcoming people as they arrive, and clearing up. The host role is mostly administrative, so someone with strong administrative skills would be needed to fulfil this role. Often, the role of the host and secretary are taken on by the same person.

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Things to do before the meeting:

- Choose a suitable date that will allow for the optimum attendance
- Book a suitable venue - somewhere comfortable and easy to get to. You should also make sure the venue has appropriate disabled access if necessary. Go to the venue if possible beforehand. If visual or hearing aids are being used, make sure that everyone will be able to see and hear well.
- Contact all the people attending to make sure they know about the meeting and remind them of any tasks they agreed to do.
- Circulate any papers that will be needed for the meeting in advance – at least seven days in some cases (eg for board/ committee meetings that may require a great deal of preparation). Relevant documents might include accounts, things to be approved, directions/ map if needed, and most importantly, the agenda (see below).
- Arrange catering - is tea/coffee/water to be provided? Are there any attendees with special dietary requirements? Even if it's a short meeting, have water available.
- Gather together any tools that might be needed (eg a flip chart, markers, handouts, pens and paper, overhead projector, recorder)
- Set up the meeting room so that everyone can see and hear each other and can see any visual aids. Make sure to accommodate for any disabilities (eg lip reading, visually impaired).

Agendas

Why do you need an agenda?

- To show people what will be discussed
- To remind people why the meeting is being held, and tell them all the details they need to know
- To let people know they can contribute, on what topics and where appropriate
- To help them prepare for all the issues to be raised
- To reassure people that the meeting will be organised and will stay within a reasonable time frame
- To use as a 'script' for the meeting and give it shape, purpose and direction
- To suggest the outline for the meeting minutes
- To help evaluate whether the meeting was a success or failure.

Who should write the agenda?

Usually the person chairing the meeting constructs the agenda. Often the agenda is co-created between the chair and the manager, director or CEO. However, not all meetings have the same requirements.

People who want to raise items of business should ask the person writing the agenda to include their suggestion. It's a good idea to let people know a deadline for adding items to the agenda so that it can be circulated in advance, along with any other important documents. This means people will have time to read long or complicated documents, and be better prepared. Try to make your agenda as informative and practical as possible, to encourage participants to prepare well, and turn up ready to join in the discussions.

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What goes onto an agenda?

An agenda should be short, simple and clear. The basic structure should follow a defined order, for example:

- Name of group/organisation
- Type of meeting (AGM, monthly committee, finance committee, staff team meeting, senior management meeting, project meeting, editorial group meeting etc.)
- Date of meeting
- Start Time and expected end time (or expected duration) – to enable participants to plan their day in advance.

  HELPFUL HINT! Place a start time against each item on the agenda – to help keep the meeting running within a time-frame
- Location
- Apologies for absence – names of those who were invited but unable to attend.
- Matters arising since last meeting. Use the minutes of the last meeting as a guide – but be wary of re-running the previous meeting by spending too much time on this!
- Items to be raised and in what order – these are usually numbered, and specific headings are given for each topic. Agenda items should include the name of the person who suggested the item (so they can be contacted), an estimate of the time the item may take, and enough detail to be self-explanatory.
- Any Other Business (AOB). The chair should be informed at the beginning of the meeting of any item to be raised here, and can then decide to include it in this meeting or add it to the agenda for the next meeting. This stops people 'sneaking in' items without the others having the opportunity to plan and consider their responses. Some organisations prefer to drop this item from agendas, to restrict the meeting to specific items and the arranged time limit.
- Formal Closure – once everything has been discussed, the chair should sum up all of the items on the agenda and the follow-up actions to be taken, checking that nobody has been allocated an unrealistic workload. The chair should also remind everyone that minutes will be circulated, check that the minute taker is happy with their record of events, and agree a time and date for any subsequent meeting. The chair should thank everyone for attending and emphasise the achievements of the meeting.

Presenting Agenda Items

When presenting an agenda item:

- Only take around one to two minutes.
- Say what you want to achieve - ie discuss the item, make a decision, approve a paper, receive information or make recommendations.
- Give a brief rundown with more background.
- Give a short list of most important issues for discussion.
- Refer to any previous discussions or decisions that are relevant.
- Refer to any support papers or material.

Presentations

If asked to give a full presentation at the meeting, carry out some background research beforehand to help make an informed contribution. Talk to other colleagues, have a look at notes or minutes from previous group meetings, or do some reading from relevant publications.

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Keep the focus of the presentation around the main message you want to convey – rather than just a series of facts that underpin this message. If the audience needs to know all these facts and figures, perhaps produce a handout that they can digest in their own time. Try to utilise the presentation as a way to influence and shape their opinions about the issue.

At the end of the meeting

Do a quick evaluation with everyone involved to gauge how it went. This also gives people the opportunity to comment. A quick and simple method is to make three columns on a flip chart, with the headings "Good / Do More Of/ Change." Get participants to list the things that were good, what needs more of, and what should be done differently in the future. List all the comments in the appropriate columns and try not to argue with the suggestions for improvement! By paying attention to the needs of the group, you can use the evaluations to adjust how you plan the next meeting. This will help to make your meetings more efficient, effective and enjoyable. (For more information see Monitoring & Evaluation)

Other Related Information Sheets

Monitoring & Evaluation

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