



Running Effective Meetings

Most of us didn't join organizations to BE in *meetings* (UGGH), we joined to DO something, to make a difference. If someone suggests holding a meeting, many groan in anticipation dreading the drudgeries of endless talk. But read on, for meetings can also be powerful, inspiring, energizing and fun when they are done RIGHT!

Although there are numerous variables that make each meeting unique, the heart of effective meetings is positive collaboration towards action – to inspire the best possible actions for all the people involved. Because it's not possible to have a one-size-fits-all approach to running effective meetings that accounts for each meeting's uniqueness, this tool instead lays out some tips, tricks, and words of wisdom to break down meeting organization in a way that can be helpful to *your* group in particular. Remember, running good meetings takes practice, hard work, and awareness (whether they are issue, Board or member meetings). The key is to prepare beforehand as best as you can and to learn from your mistakes.

15 Steps to Good Meeting Facilitation

Every meeting should be enjoyable, efficiently run, and build organizational morale. Efficient meetings respect people's time as their most valuable resource.

Every meeting needs a facilitator, a person who helps the meeting accomplish its goals. The facilitator must know ahead of time that she or he will facilitate the meeting. Having other roles designated, such as note-takers and timekeepers, assists the facilitator in moving the agenda along.

Being a good facilitator is both a skill and an art. It is a skill in that people can learn certain techniques and can improve their ability with practice. It is an art in that some people just have more of a knack for it than others.

A good facilitator is concerned with both content and style of a meeting. Here are some guides for meeting facilitation that address both:

What Does it Mean to Facilitate?

- ✓ **Creating** a sense of shared ownership between participants and facilitator;
- ✓ **Setting a tone** and creating a process for equal participation;
- ✓ **Utilizing** creative techniques that tap participants' best thinking while managing conflict;
- ✓ **Guiding** groups toward specific goals; and
- ✓ **Managing** time and the group process well.
- ✓ The facilitator must assure that decisions are made, plans are developed, and commitments are made, but in a manner that is enjoyable for all concerned.

1. Start the Meeting Promptly. Do not penalize those who did come on time by starting a meeting late. However, for very large group meetings, plan to start within 10-15 minutes of the official start time (or expect that they will start 10-15 minutes late). For smaller meetings, particularly regular organizational meetings, start exactly on time.

2. Welcome Everyone. Do not, under any circumstance, bemoan the size of the group. Once you are at a meeting, the people there are the people there. Go with what you have. You may want to analyze the recruitment plans after the meeting.

3. Introduce People. If just a few people are new, ask them to introduce themselves. If the group as a whole does not know one another well, ask people to answer a question or tell something about themselves that provides useful information for the group or the chairperson.

It is important to make everyone feel welcome and listened to at the beginning of a meeting. Otherwise, participants may feel uncomfortable and unappreciated- **and won't participate well in later parts of the meeting.**

4. Review the Agenda. Ask the group if the agenda is adequate. While it will be adequate most of the time, someone may suggest something otherwise overlooked. Either deal with the item directly, or explain how or when the issue can be addressed effectively.

5. Explain the Meeting Rules. Most groups need some basic rules of order for meetings. If you choose to use a formal system, such as Robert's Rules of Order or a consensus based model, make sure that everyone understands how to use them. See the end of this document for some resources on learning about decision making in meetings.

6. Encourage Participation. Every meeting should involve the people who come. Encourage leaders and organizers to listen to people. Draw out those who seem withdrawn from discussions.

7. Stick to the Agenda. Groups have a tendency to wander far from the original agenda. When you hear the discussion wandering off, bring it to the group's attention. You can say, "That's an interesting issue, but perhaps we should get back to the original matter of discussion." Also, avoid repeating information for those who haven't arrived on time or haven't read the information sent to them prior to the meeting. If important items are brought up that aren't relevant for the current discussion, record them in a "parking lot" to be addressed later. A "parking lot" is simply a place where agenda items are stored for future use.

8. Avoid Overly-Detailed Decision-Making. Frequently it is easier for a group to discuss the color of napkins than it is the real issues it is facing. Avoid getting immersed in details, suggesting instead, "Perhaps the committee could resolve that matter. You don't really want to be involved in this level of detail, do you?"

9. Move to Action. Meetings should not only provide an opportunity for people to talk, but should also challenge them to take action. Avoid holding meetings just to "discuss" things or "educate" people. Meetings should plan effective actions to build the organization. This can be facilitated by cleanly identifying "action items" and "items for discussion" on the agenda.

10. Seek Commitments. Getting commitments for future involvement is usually a goal of most meetings. Make sure that adequate time is allocated to seeking commitment. For small meetings, write people's names next to the tasks they

agreed to undertake. The chairperson may want to ask each person directly how he or she wants to help. One rule of thumb, especially for meetings of less than ten people, is that everyone should leave the meeting with something to do. Don't ever close a meeting by saying, "Our organizer will get back to you to confirm how you might get involved." Seize the moment.

11. Bring Closure to Discussions. Most groups will discuss items much longer than needed. The facilitator is responsible for recognizing when a group is basically in agreement (yet is continuing to labor over the topic) and to move the discussion forward. In this case, formulate a consensus position, or ask someone in the group to formulate a position that reflects the group's

general position and then move on. If the group simply cannot agree, the facilitator needs to practice their skills of conflict resolution and decision making (see Additional Resources for helpful articles on this process).

12. Respect Everyone's Rights. The facilitator is the protector of the weak in meetings. He or she encourages quiet or shy people to speak and does not allow domineering people to ridicule others' ideas or to embarrass them in any fashion. Try one of these phrases for dealing with domineering people: "We've heard a lot from this side of the room. Are there people with thoughts on the other side of the room?" Or, "Let's hear from someone who hasn't spoken yet." Also, never criticize individual group members about their job performance in front of others. Instead, schedule individual meetings between supervisors and supervisees to evaluate and discuss performance if necessary.

A Facilitators Preparation Checklist

From *Assessing your meetings*, by ICL

- ✓ Is it clear *why* you're meeting?
- ✓ Have the right folks been invited – the ones who have the power to decide, and the ones who will implement or effect the decision?
- ✓ Is the agenda available ahead of time, clearly indicating what decisions will be made and what actions taken?
- ✓ Is information available ahead of time so participants can read it?
- ✓ Is the meeting space adequate and pleasant and can individuals see and hear one another clearly?

2 Quick Tips to Make the Most of Your Meetings

(From Dr. Tom McDonald writing in *Successful Meetings*)

1. Teach a few people to be inside facilitators. Explain the ground rules of how to run an effective meeting: set an agenda, stick to it, start and end on time and make sure everyone gets his say.
2. Use innovative meeting tactics. Set up the meeting room in a non-traditional way, such as setting chairs in a circle or having everyone stand for the meeting. Schedule meetings just before lunch or at the end of the day.

Sometimes people dominate a discussion because they are really interested in an issue and have lots of ideas. There may be ways to capture their interest and concern, without having them continue to dominate the meeting. In other situations, people just talk to hear themselves. If a person regularly participates in your organization's meetings and regularly creates problems, a key leader should talk with him or her about helping involve new people and drawing others out at meetings.

13. Be Flexible. Occasionally, issues and concerns arise that are so important, you must alter the agenda to discuss them before returning to the prepared agenda. If necessary, ask for a five-minute break in the meeting to discuss with the key leaders how to handle the issue and how to restructure the agenda. Be prepared to recommend an alternate agenda, dropping items if necessary.

14. Summarize the Meeting Results and Follow-Up. See the box on 6 Easy Steps to Good Meeting Follow-Up

15. Thank People and Close the Meeting on or Before the Ending Time. Take a moment to thank people who prepared things for the meeting, set up the room, brought refreshments or typed up the agenda. Also, thank everyone for making the meeting a success.

Board Meetings

(From *10 Quick Ways to Improve Board Meetings*, by Jan Masaoka, Executive Director of Compasspoint nonprofit services)

When we think about the boards we're on, we usually think about the board meeting –which says a lot about the importance of having good meetings. In order to make your meeting better, make a resolution to implement one of the following ideas each month:

- 1. Name tags for everyone, at every meeting.** It's embarrassing to have seen people at several meetings and wondered what their names are. Later it's really hard to admit you don't know their names.
- 2. Post an acronym chart.** Make a poster of frequently used external and internal acronyms (such a CWA- Clean Water Act) and post it on the wall of every meeting. (If you distribute the list on paper it is soon lost.)
- 3. Don't include committee reports on the agenda just to make the committees feel worthwhile.** If a committee has done work but doesn't need it discussed, put it in the board packet. In the meeting, be sure to recognize the committee's good work and refer people to the written report. Schedule committee reports in the context of the main discussion.
- 4. Write an "anticipated action" for each agenda item.**
Examples:
 - "Finance Committee report, brief questions and answers: No action needed"
 - "Volunteer recruitment and philosophy: Anticipated Action: form committee or three to four board members"
 - "Public Policy Committee: Anticipated Action: approve organizational statement to city council on zone changes."
- 5. Make sure the room is comfortable!** Not too hot or cold or crowded. Offer beverages and something light to eat, such as cookies or fruit.

These Meetings Can:

- ✓ Create a sense of community, connectedness, and being one team working toward the same mission.
- ✓ Enable volunteers and leadership to understand, appreciate, value, and support one another's work.
- ✓ Bring a wide variety of voices to bear on important issues or problems facing the organization.
- ✓ Enhance members' sense of ownership and importance by inviting them to meaningfully participate in decisions that affect them.
- ✓ Improve the planning and coordination of activities that have an organization-wide impact.

Membership Meetings (Annual General or other)

(Taken in part from *How to Have Effective Staff Meetings*, by Susan Gross and Robin Katcher)

Meetings between leadership, volunteers and members are essential for the smooth workings of the organization. Whether you are planning an annual general meeting as required under non-profit 501(c) 3 status, or having a general membership meeting, the tips outlined in this section can be useful:

- **Don't throw the agenda together at the last minute.** Ask members for their ideas on what to include in each meeting's agenda. Include at least one juicy topic that will engage the entire group.
- Ask volunteers to briefly **report on the activities** they have been most involved with or that are most important for the rest of the group to know about.
- Publicly **acknowledge achievement.**
- **Request input from the membership** on decisions that affect them all, including topics such as focusing on a new issue area, or developing a new organizational position.
- **Share information relevant to all members.** For example, update volunteers and members on the organization's financial status or describe a new statute impacting the organization's work.
- **Celebrate successes** and occasions with the entire organization, like meeting fundraising goals, winning a legislative victory or acknowledging a volunteer's birthday.
- **Avoid certain topics** that are only relevant to a portion of the group; instead use a smaller meeting for this purpose.
- **Strike a balance** between encouraging full discussion and keeping the conversation focused.
- **Don't ask for the non-leadership input unless you really want to hear it.** Nothing is more disempowering for members than being asked for input on an issue that has been decided.
- **Revisit your goals** to see how well these meetings are fulfilling members' needs and make adjustments.

6 Easy Steps to Good Meeting Follow-Up

1. **Make sure that your note-taker prepares the meeting notes** soon after the meeting. Otherwise, he or she will forget what the comments mean, and they will be useless later. Organizers should work with the note-takers to assure that these notes are clear.
2. **Call active members** who missed the meeting. Tell them you missed them and update them on the meeting's outcome. If you are actively seeking new people, call anyone who indicated that he or she would come, and not just active members.
3. **Call new people** who came to the meeting. Thank them for coming and see about setting up one-on-one meetings with people who look like potential leaders. Follow up with people while their interest is still fresh.
4. Once the minutes are prepared, **write relevant reminder notes** in your calendar. For example, if someone agreed to research something by March 15, jot down to call the person on March 7 and inquire about how the research is progressing.
5. Before the next meeting, the officers and staff should **assure that tasks that were agreed to at the last meeting are accomplished.** Reports should be prepared for the beginning part of the next meeting.
6. Place a **copy of the meeting notes in an organizational notebook** or file so that everyone knows where the institutional memory is kept. For meetings of your board of directors, the minutes are the legal record of the corporation. Minutes record important legal decisions and are reviewed as part of the annual audit.

Additional Resources

- The *Institute for Conservation Leadership* offers trainings to conservation organizations in meeting facilitation and other aspects of organizational development. Call 301-270-2900 or visit www.icl.org.
- The *Internet Nonprofit Center - Nonprofit FAQ* offers information and advice on many aspects of meeting facilitation. Visit www.nonprofits.org/npofaq/
- *Management Assistance Group* provides support to nonprofits. Visit www.managementassistance.org
- *Find National Endowment for the Arts "Effective Meeting Facilitation: The Sine Qua Non of Planning,"*
- *Non-Profit Nuts and Bolts* assists with elements of non profit management and organization Visit <http://www.nutsbolts.com/np-mission.htm>
- *Free Management Library*, by Carter McNamara, is a web-based library with useful information on all aspects of running a nonprofit organization. Visit www.mapnp.org/library.