Running Effective Meetings

&

Facilitating Groups

Revised, July 2002

A guide developed by
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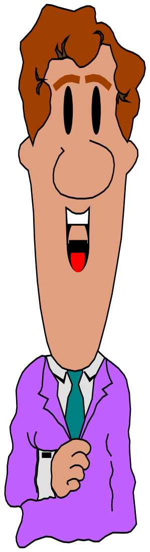
Starting the Meeting

INTRODUCTION EXERCISES



It is essential for meetings to start with some type of Introduction Exercise or Icebreaker. When you have a large group, or you have a very full agenda, it may seem like a waste of time to conduct personal introductions. But we have found that introductions are crucial to the overall comfort, trust, and risk-taking ability of the group.

Introductions provide a way for group members:

- to get to know each other,
- to gain a deeper appreciation of each other as individuals, and
- to understand the mindset of different group members on the meeting day.

If you are dealing with a particularly large group and personal introductions will take too much time, you may wish to have the group sit at small tables where introductions can take place among 4-8 people. At the very least, provide time for people to introduce themselves to the one or two people sitting next to them.

Some examples of Introduction Exercises or Icebreakers are:

1. Make nameplates and introduce yourself with your nameplate. Be sure to have group members write their name on both the front and the back of the nameplates. This enables people sitting next to, as well as across from, each other to read the nameplates.

2. Take turns saying your name and then, saying or acting out something you like to do while the group repeats your name and mimics your acting. This example is useful as a round-robin memory exercise.

3. Meet the person next to you and let them introduce you to everyone else.

4. Take something out of your wallet, pocket, or bag and tell everyone why it is important to you.

5. Have each person in the group identify themselves with a musical instrument, cartoon character, animal, etc. (choose one) and explain why. Then ask them to guess what musical instrument, etc. their colleagues and/or friends might have identified and explain.

6. Ask people to identify themselves and then tell what they had for breakfast that morning.

7. Ask people to identify themselves and then talk about what their commute to the meeting was like that day.

SIGN-IN SHEET

A Sign-in Sheet is a way to take attendance and have evidence of who was at a meeting. Sometimes you may only need signatures. Other times, you might want the meeting participants to give more information, such as mailing address, telephone number, e-mail address, and fax number. E-mail is especially efficient when you want to send a quick memo, the minutes of the meeting, or information pertinent to a group of people.

Participants often underestimate the value of the Sign-In Sheet and therefore write quickly and often messily. If you want to refer to the Sign-In Sheet for phone numbers and addresses, be sure to stress to them to **write legibly**.

Below is a simple sample of a Sign-In Sheet.

SAMPLE:

NAME	PROGRAM / ADDRESS	TELEPHONE #	EMAIL
Marcia Drew Hohn	Northeast SABES 45 Franklin Street Lawrence, MA 01840	978-738-7301	Mdrewhohn@aol.com
Alisa Vlahakis	Northeast SABES 45 Franklin Street Lawrence, MA 01840	978-738-7304	Avlahakis@aol.com

Getting Organized

AGENDA

It is very important to have an agenda (a list of things that the group needs and wants to talk about). It is a way to make sure that all the necessary discussion takes place and to keep the meeting "on track".

The agenda is usually set before the meeting--most often by the person who will lead the meeting (the chairperson). Sometimes the agenda items are decided at a previous meeting and sometimes the chairperson sets the agenda by conferring with other group members outside of meetings. The agenda should be typed and copies made for everyone in the group. It helps meetings run more smoothly if the agenda is posted in a conspicuous place. Then, group members know what will be discussed and can prepare for the discussion.

An agenda can be changed during the meeting. Sometimes new items to discuss are added or the order of discussion is changed. Sometimes agenda items are deleted if the group decides they do not need to talk about a particular item or the discussion is deferred to another meeting. The chairperson of the meeting should ask group members if they have additions or changes to the agenda at the beginning of the meeting.

It is a good idea to have times assigned to each agenda item so you will know approximately how much time the meeting will take.

A SAMPLE AGENDA OF A 1.5 HOUR MEETING WITH TIMES ASSIGNED FOR EACH AGENDA ITEM:

Introduction of new members	10:00 - 10:10
Additions/changes to the agenda	10:10 - 10:15
Review of information and/or minutes from last meeting	10:15 - 10:25
Reports on progress by group members	10:25 - 11:00
New business Tom's request to buy books, Irina's proposal for a field trip	11:00 - 11:20
Other business	11:20 - 11:30

Another agenda format that is useful is to have individual group members responsible for facilitating each agenda item and/or a designated outcome needed, using a grid with columns. **For example:**

ITEM	TIME	PERSONS RESPONSIBLE	OUTCOME NEEDED

HOW TO CHOOSE THE CHAIRPERSON

Sometimes someone becomes the chairperson because of his/her position in the group. For example, s/he is the director or the supervisor of others in the group. Sometimes the group elects the chairperson to serve in that role for a particular period of time (six months, a year, etc.).

In groups where there is a lot of shared responsibility and shared leadership, rotating the duties of chairperson works well. In this case, each person takes a turn at being the chairperson. This can be done alphabetically so that the person whose last name begins with “A”, or the closest to “A”, goes first and then down the list of group members alphabetically, starting over when you have reached the last person. In this way, all the group members gain experience in chairing meetings and the work of being a chairperson (which is considerable) gets shared.

ROLE OF THE CHAIRPERSON

The chairperson is important because s/he takes the responsibility for many tasks that keep a meeting running smoothly.

It is the responsibility of the chairperson to:

◊ arrange for the room and refreshments;

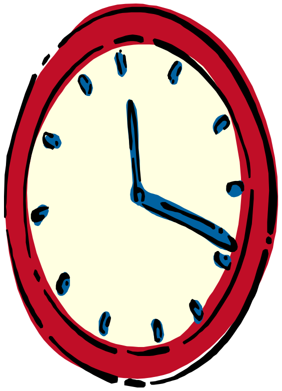
◊ set the agenda and type and distribute it (preferably prior to the meeting);

◊ start the meeting on time;

◊ lead the meeting, making sure the group stays on the agenda item under discussion, and keeps within the time set for that item; and

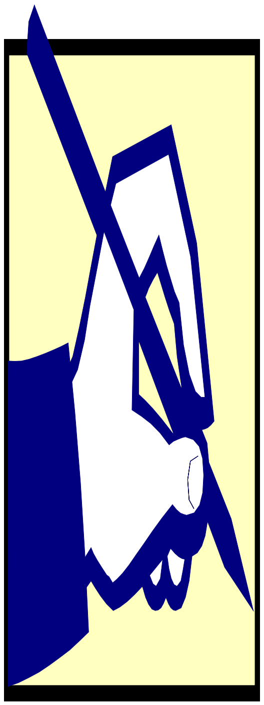
◊ end the meeting on time.

TIMEKEEPER



The role of the timekeeper is to keep track of the time during the meeting. Usually a group has a lot of items of the agenda to cover during the meeting. Very often, it takes longer than expected to discuss/decide about those items. The timekeeper helps keep the group "on track" by telling them if they have run over the allotted time for an item (if a specific time has been set) and /or how the group is progressing on time overall. For example, suppose there are ten items to discuss on the agenda in a two-hour meeting. After one hour only two items have been addressed. The timekeeper would then bring the group's attention to this fact so the group could decide whether to defer items, speed up discussion or take another tack. Sometimes the chairperson functions as a timekeeper but often there is a separate timekeeper at meetings.

NOTE-TAKER



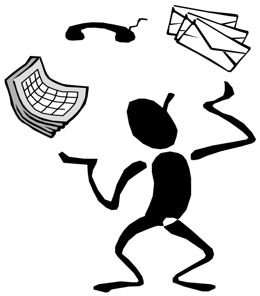
The note-taker records the important comments and decisions that the group makes during the meeting. These notes are called the "minutes" of the meeting.

Notes may be handwritten discretely while the meeting is conducted. However, many groups, business, and organizations (Northeast SABES included) take notes on large newsprint with colored markers so that the notes will be visible to everyone throughout the meeting. The visibility of the notes allows an agreed-upon collective perception to be recorded. Members of the group can repeat or reword statements for the note-taker so that they are sure what they have said is written in the manner they wish. This helps to avoid misunderstandings later. Large newsprint notes also provide a handy reference to what was said and can be useful in planning processes.

Note-takers often have the notes typed after the meeting for duplication. However, if the notes are taken in neat, legible handwriting, they can be duplicated as is. Increasingly, note-takers are using a laptop computer in order to save time. Laptop notes are easily sent via e-mail or printed out directly, without the additional step of typing handwritten notes into the computer. Any way that works best for the group is fine.

Finally, it is important for the minutes (the meeting notes) to be distributed to the members of the group. This can be done at the next meeting. However, if possible, it is better to distribute the minutes with the upcoming agenda **before** the next meeting.

MEETING ORGANIZER

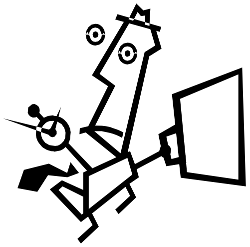


For a group to function effectively, it is important to know in advance how you will operate. Some important considerations for meetings are:

TIME:	On what day and at what time will you meet? Is this a convenient time for all involved in the meeting?
PLACE:	Where will you meet? Do people need directions to the meeting place? How do you want to set up your space? (Sometimes you don't have a choice and a room can only be set up one way.) Do you want people to sit in small groups? Or around a big table?
TOPICS:	What is your agenda?
CHAIR:	Who will print up the agenda and run the meeting?
FOOD:	Will there be snacks? Who will bring them?
MINUTES:	Who will take and distribute notes from the meeting?
ATTENDANCE:	What if it snows? Who do you call if you can't come?
MEMBER LIST:	Who are the members of the group and how do you contact each other?

Setting Ground Rules

SIMULATION OF A DIFFICULT MEETING



GROUP MEMBER	ROLE
The INTERRUPTER	Your role is to constantly interrupt people when they are talking. You never let anyone finish what he or she is saying. To do this you may have to speak loudly and be rude.
The BIRDWALKER	Your role is to go off track by changing the subject or by talking about something that isn't relevant to the discussion or meeting topic.
The KNITTER	Your role is to NOT pay attention. This means you are doing something distracting while other people are talking. For example, you could be making your grocery list, knitting, reading a magazine or staring into space.
KRAMER	You walk into the meeting late and cause quite a distraction by trying to find a seat and getting settled. You may even interrupt the meeting to apologize for being late and then continue to ask questions because you missed the beginning of the meeting.
The SIDE-TALKER	During the meeting you constantly whisper or make comments to the person sitting next to you. You don't give the chair your full attention. You may even be talking about something that isn't related to the meeting topic.
The DO-ER	You are trying to listen to what others are saying and you continue to make concrete suggestions about how the group can raise funds. You try hard to keep the group on track and to make a decision.
The CHAIR	The topic of the meeting is to plan ways to raise funds for the group. You don't have control of the meeting.
The OBSERVER	What do you notice? What's going on?

GROUND RULES

Every meeting should have ground rules. Ground rules are the expected rules of conduct that are important for the group's full participation and success. It is a good idea to let the people at the meeting make the ground rules. We suggest that you put the ground rules on a large sheet of newsprint, which can be hung as a visual reminder to keep the group members loyal to the rules.

LEARNING COMMUNITY BEHAVIORS

You may decide that setting ground rules is too rigid or too formal an activity for a certain training. Or perhaps your group meets on an ongoing basis and you decide to emphasize that taking risks and pushing the limits is important. Below is a list of Learning Community Behaviors that allow participants to think about their priorities, attitudes, and goals for the meeting.

Review the Learning Community Behaviors with the group. Ask them if they can uphold these behaviors during the meeting. Then ask the group to identify which behaviors are most crucial for them that particular day- or you as the facilitator or chairperson can request that the group pay special attention to a particular behavior that day. These guides tend to promote an open-minded atmosphere and creative, honest exchange.

- **Be fully present.**
- **Be responsible for your own needs.**
- **Listen, listen, listen and respond.**
- **Experiment: try out new ideas and behaviors.**
- **Take risks. Be raggedy, make some mistakes -- acknowledge them, and then let go and move one.**
- **Lean into discomfort.**
- **Accept conflict and its resolution as a necessary catalyst for learning.**
- **Be crisp and say only what is key.**
- **Be open-minded to new thoughts and different behaviors.**
- **Honor confidentiality.**
- **Assess your own learning periodically throughout the session.**
- **Accept diversity as a gift.**

Adapted from the Kaleel Jamison Consulting Group and
Jenifer Van Deusen, Maine Center for Educational Services

Very often at meetings, people get side-tracked. When people either talk about or have questions about something that is not on the agenda, you can write them down on a big piece of paper marked “Issues Bin” or “Parking Lot”. Later, when you have time, you may talk about what issues got parked in the lot.

It can be difficult to decide when issues belong in the Parking Lot or need to be discussed immediately. The chairperson needs to exercise judgment with respect to potential Parking Lot Issues, but she/he can also ask the group their opinion on whether to park the issue or not.

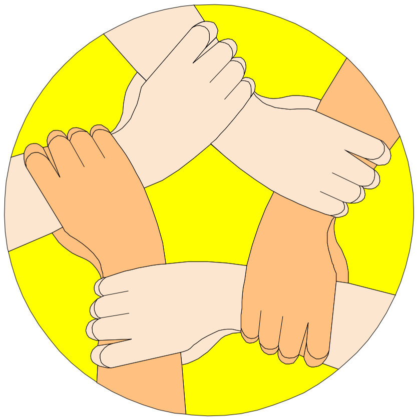
BREAK TIME

It is very important to take a break. People lose interest if they sit too long. Set time aside so people can go to the bathroom, get a cup of coffee or juice, have a snack, or just stretch. Then they will be refreshed and ready for the rest of the meeting.

Sometimes if it is a short meeting, people will choose not to take a break. It should always be up to the group to decide. Usually we schedule breaks after two hours of meeting. If you have a long meeting, provide regular opportunities for people to stretch, get some air, and eat.

You will also find that providing refreshments for the meeting, such as coffee, pastry, and fruit, brightens the attitudes of meeting participants and helps foster a caring, relaxed atmosphere.

Facilitating



Techniques for:

- **Easing into productive conversation**
- **Getting the information you need**
- **Building consensus**
- **Making informed decisions**

THOUGHTS AND TIPS FOR FACILITATORS

What is a "facilitator"?

"The person who makes things easier for the group by smoothing the path, so the group can work together better."

Student Action Health Team at Operation Bootstrap, Lynn, MA

When trying these facilitation techniques:

- Recognize that facilitation takes time, patience, and lots of practice.
- At first, people may resist these techniques because they are new and unfamiliar. Be persistent!
- It is a skill to ask the "right question". Learning to ask the right questions for each activity takes time and thought, and becomes easier with experience.
- These facilitation techniques promote participation and inclusion in decision-making processes and therefore distribute power among group members. What a person believes about power is likely to influence how these participatory techniques are perceived. If it is believed that power is finite and there is only so much to go around, then a person may feel threatened by techniques that redistribute power (especially if it is their power being threatened!). However, if one believes that power grows by giving it away, then participatory techniques are perceived as a way to share and increase power within the group.

Active listening is when the listener relates to the speaker by hearing the feeling behind the words and reflecting back the content of what the speaker said.

An Active Listener:

- Translates what the speaker said but doesn't parrot back word for word
- Expresses understanding of how the speaker feels
- Accurately reflects the content of what the speaker is trying to say
- States an understanding of what the speaker sees as the problem

Active Listening can be a simple rewording or paraphrase:

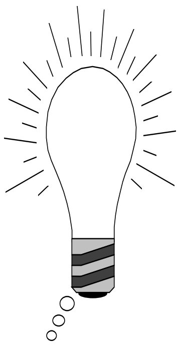
Speaker: "I don't have time to prepare the materials for all of the units that I want to teach. Every lesson needs to be re-thought and materials made or found. I've got more to teach than just math."

Listener: "You're busy with all of your classroom responsibilities and wondering where you'll find the time you need."

It may also include a response to the feeling:

Listener: "You're frustrated with trying to juggle the time demands of the math program with all of the other classroom demands."

Brainstorming is a way for everyone to come up with as many ideas as possible about a particular topic. It is a very successful way to generate new ideas in a short period of time that uses the collective knowledge and experience of the group. There are many different ways to brainstorm, but the most important thing to remember is that all ideas get heard and recorded without judgment or censorship.

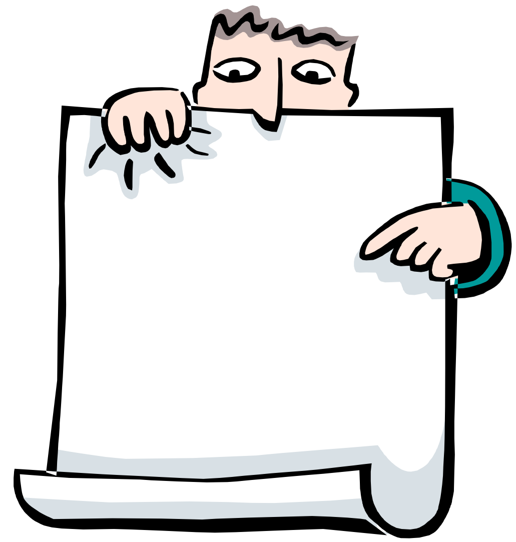


Try to remember that, in a "brainstorm":

- ♦ Everybody participates;
- ♦ All ideas are recorded;
- ♦ One may throw out or write down ideas without being concerned with positive or negative feedback;
- ♦ Repetition is O.K.;
- ♦ Piggybacking, or building on others' ideas, is encouraged;
- ♦ Strive for quantity vs. quality of ideas.

ROTATING NEWSPRINT

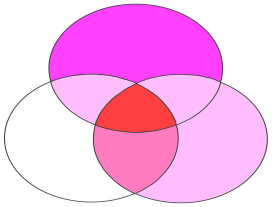
Generating Ideas in Small Groups



Rotating newsprint is a way to generate ideas in small groups on a number of topics for the benefit of the larger group. Have group members number off to get in groups of 3-4 people. Each small group is asked to take 15 minutes to generate ideas responding to a particular question or area of need. Each group gets a different question or need. They record their ideas on newsprint.

The groups then pass their newsprint on to the next group for their review, consideration and additions. This continues until all groups have seen each other's newsprint. In this way, the total group gets the benefit of the thinking on a number of issues in an efficient manner. They also have an opportunity to add additional ideas. The group will then need to decide what will happen with these ideas.

DOT VOTING/SPEND A DOLLAR



Dot voting is a way to prioritize items that need to be addressed. (These items may be the ideas that were identified as a result of an Affinity Diagram exercise!) Dot Voting provides a fun and anonymous means for everyone to vote on what is most important. Depending on the number of items and the resources and time of the group, provide one to three dots per person. If you give more than one dot to each person, you are allowing more than one item to be identified as important. Also, more dots allow a person to allot some or all dots to one item, further indicating the importance of a particular item.

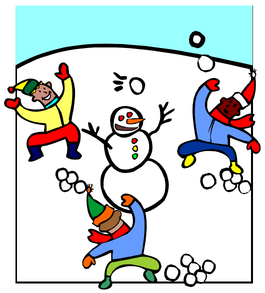
$

A variation of voting with dots is to vote with a "dollar". You may divide your "dollar" into any amounts you wish and you may spend your "dollar" any way you wish. For example, you may put $ .25 on four items or the entire "dollar" on just one item.

For Example:

ITEMS	**DOLLAR AMOUNT**
PARENTAL INVOLVEMENT	$0.25
CHILD CARE	$0.50
TRANSPORTATION	$0.10
MATERIALS	$0.15
TOTAL	**$1.00**

SNOWBALL/CONSENSUS-MAKING ACTIVITY



The purpose of the snowball/consensus-making activity is to have group members reach agreement about the group's most important steps or activities. For example, suppose a group has generated a lot of ideas about activities they might undertake to accomplish a particular purpose, and needs to come up with the three most important of these activities. The snowball/consensus-making activity would be helpful.

Step 1 Ask participants to take 3-4 minutes to write down individually the three top ideas they have heard.

Step 2 After four minutes, ask participants to stop and find a partner. They will have five minutes to share what they have written with their partner, and the two of them must come to consensus. They should write down the top three ideas they both agree upon.

Step 3 After five minutes, tell them to stop, even if they are not finished. Each pair should find another pair (to make a foursome), and that four should come to consensus and come up with no more than three ideas. These recommendations should be written by their group on a large sheet of newsprint. Ask them to tape their newsprint up on the wall in front when they are finished.

Step 4 Bring the whole group together. Ask the group to see if there are any ideas that are included in all the individual lists. If so, paraphrase that idea and write on a fresh sheet. Cross off that recommendation from the individual sheets. Continue to find similarities, write them on the new sheet, and cross them of the individual sheets. For ideas that are not on all sheets, ask participants if it is important enough to include on the new sheet. If so paraphrase and add.

Step 5 Ask participants to review the new sheet, which now contains the whole group's consensus.

AFFINITY DIAGRAMS

The creation of an Affinity Diagram is a valuable process for generating and organizing ideas, eliciting input from quiet members of the group, and facilitating participation of group members who might be at a disadvantage due to unequal power relations. Affinity Diagrams require the writing of ideas rather than speaking, and some people feel safer and more anonymous with this technique. The Affinity Diagram exhibits the differences or similarities in thinking of the members of a group.

Generally speaking, the Affinity Diagram technique is useful for small groups of up to 8 people. This technique grows out of the "Total Quality Management" orientation used in many corporations and organizations.

STEP 1 Give 5 - 7 small Post-it notes to every member of the group. Based on the purpose of the task, ask members to take a few moments, silently and individually, to list 5 - 7 ideas, one to a Post-it. Stress that they should write more than a one-word idea; the idea should be a short phrase or at least several words, enough to clearly depict the idea.

STEP 2 After 5 - 10 minutes, ask people to tack their Post-its randomly onto a large sheet of newsprint.

STEP 3 Ask everyone, with an absolute minimum of talking, to look at all the Post-its and rearrange them on the sheet of newsprint according to categories, i.e., group like Post-its together. Everyone should participate in the grouping and sometimes this involves Post-its being moved from group to group a number of times. This is okay and part of the process. This may take up to 20 minutes. When the Post-its have been arranged into groups of similar ideas, tape each group of Post-its together with a long strip of scotch tape, so that Post-its are not lost in transit after the meeting. You'll be surprised how many times you may need to refer to your Affinity Diagram!

STEP 4 When the Post-its have been rearranged into groups of similar ideas, ask everyone to help assign a title to each group of Post-its. This may take some discussion. The title should clearly and completely describe the ideas expressed in the Post-its. The title should also be a complete sentence. You want to be sure to capture the total essence of the ideas in a group so that if the Post-it were ever lost, you have a concrete statement that clearly represents the ideas of the group.

FINALLY When all the groups of Post-its have been entitled, you then should have a number of themes or priorities from which to continue working or to plan a course of action.

INTERRELATIONSHIP DIGRAPH

Looking at the Nature of Interrelationships

The Interrelationship Digraph is a way to map out relationships among a group of ideas or processes. It identifies which ideas or areas are "drivers" and which ideas or processes are "outcomes" or "effects". It is an excellent way to better define a large number of complex, interrelated issues and identify "root causes".

Step 1 Write down summary ideas or processes—each on a separate post-it. Group post-its in a circle (any order).

Step 2 Begin with header card at the top. Look at the relationship of that idea or process to the next header card in the circle. Ask "does this idea/area cause this other idea or process to happen or is it an outcome or effect?"

Step 3 Draw an arrow that represents the cause or outcome. Draw the arrow from the idea or process that is a cause toward the idea/area it is influencing. **Draw the arrows in one direction only**. In two-way arrow situations, choose the stronger cause of the two. Do not draw an arrow if there is no relationship.

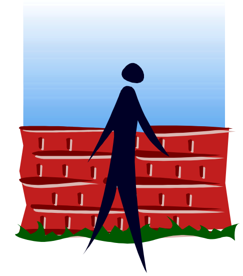
Step 4 With the same header card at the top, proceed to the next idea or process in the circle, drawing the arrow to indicate the direction of influence. Proceed around the circle in an orderly fashion, drawing each relationship arrow as it is decided.

Step 5 Move the next header card in the circle and repeat the process, going all around the circle. As you complete the circle with each header card, the process gets shorter.

Step 6 When you cave completed all the header cards around the circle, look for the ones that have the most arrows coming out of them. These are the "drivers". Look for the ones with the most arrows pointing toward them. These are the "outcomes" or "effects". Some will have a mix of both. The drivers are the ideas or processes that need a lot of attention.

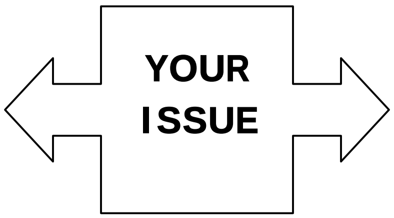
Important Note: This technique should generate some heated discussion about root causes and spheres of influence. The conversation should deepen thinking and perhaps develop greater insights. It does require strong facilitation to promote disagreement without being disagreeable. The resulting digraph can be quite formidable to look at but is frequently very enlightening. I learned about Interrelationship Digraphs in Total Quality Management where the technique had a slightly different purpose. I adapted it for use as a "Systems Thinking" tool. – *Marcia Hohn, Director, Northeast SABES*

FORCE FIELD ANALYSIS



Force Field Analysis is a tool for problem solving. It helps to assess a problem carefully by identifying the forces that support and hinder a particular issue. This technique can be used in a group as long as everyone gets a chance to participate. To do this think of a current problem, phenomenon, or difficulty that you would like to see changed, corrected or improved upon. Then on the right side of the newsprint list all the forces that are preventing the change or desire from taking place (barriers). Then on the left side of the newsprint list all the forces that are pushing for or supporting the change (supports).

Supports



Barriers

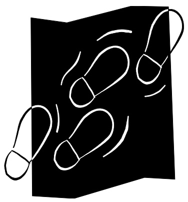
After you completed the above list, you will want to discuss how to increase the supports and/or how to decrease the barriers.

Closing the Meeting

RENEGOTIATING TIME AND AGENDA

It is not unusual for a group to find that there is not enough time to discuss all the items on the agenda and/or that important items (not on the agenda) come up for discussion during the meeting. When the chairperson sees this happening, s/he should ask the group to decide how they want to handle it. The group may decide to defer items to another meeting, meet for a longer time, eliminate items from the agenda, or take some other action.

NEXT STEPS OR ACTION PLANNING



It is a good idea to spend a few moments at the end of a meeting clarifying any action that needs to be taken and who will be responsible for taking that action. The group may review decisions at that time. In this way, important decisions and actions to be taken will be recorded on meeting notes and are reviewed just before the meeting adjourns. A sample chart for recording action plans is given below.

Item	Action	Who's Responsible	Due Date

Evaluation techniques can range from very simple to complex. A very simple technique is to have a piece of newsprint divided into two columns: “What Was Good about the Meeting” and “How to Improve”. The chair elicits and records the comments from the group. The chairperson could also ask people to write their comments on Post-its and then stick them in the appropriate column. More formal techniques usually include a written set of questions with a rating scale, agree/disagree, or open-ended formats for members’ responses.

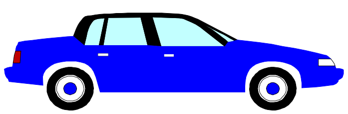
Such questions could include:

Do you think we met our objectives for meeting?

Did we abide by our ground rules?

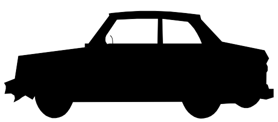
Responses can be done entirely in writing and then reviewed by the chair or the group can review the responses as a whole. If the group will be meeting on a continuing basis, it is probably wise to review the evaluation as a group.

Another option is to use imagery for creative and somewhat humorous evaluation. One example is to ask participants to rate the meeting with reference to different automobiles:



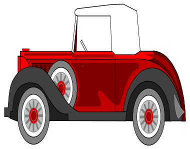
Did this meeting operate like a Cadillac DeVille?

Smooth, easy perfection, purring right along?



Or was it like a Ford Escort?

Predictable, dependable, chugging, but getting the job done?



Or was it like the old Edsel?

Dysfunctional, poorly planned, unproductive, a waste?