

Conducting Effective Meetings

Overview

Purpose

The purpose of this module is to provide information of how to conduct team meetings, and how to identify opportunities for facilitation and training as part of meetings.

Objectives

At the end of this module participants will be able to:

- Identify key aspects of planning, conducting, and evaluating team meetings.
- Develop a detailed meeting agenda.
- Identify communication skills needed for conducting effective meetings.

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Why Have Meetings?

Much of the important work of improvement teams will be done in meetings where two or more team members come together for a specific purpose. Effective meetings have the following benefits:

- Important issues are addressed.
- High quality decisions are made.
- Work gets done that could not be done by individuals working alone.

Although meetings are notorious for confused debate, tedious repetition, and ineffective decision making they continue to be necessary because they often are the only mechanisms by which all factors of a complex problem can be discussed, assessed, and solved. The focus of this module is on conducting effective meetings.

Meeting Ground Rules

The team must decide on a set of ground rules about how meetings are run which everyone can accept. These rules are designed to prevent misunderstandings and disagreements and each member is expected to respect them. A few of the more important rules should cover:

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Attendance

Teams should place a high priority on meetings and recognize that everyone must be there in order for the best work to emerge. The team should talk about what would be legitimate reasons for missing a meeting and establish a procedure for informing the team leader if a member must be absent from a scheduled meeting.

Promptness

Team meetings should start and end on time. This is respectful of everyone's schedule and avoids wasted time. The team should decide what it means to be "on time," how strongly to enforce this rule, and what it can do to encourage promptness.

Meeting Place and Time

Agree on a regular meeting time and place, and establish a procedure for notifying members to confirm regular plans or communicate changes.

Meeting Agenda

Each meeting should have an agenda – a plan for what is to be accomplished. Team ground rules should address how agendas are created, how changes can be suggested and/or confirmed, and that agendas will be used.

Participation

Make it clear that you consider everyone's viewpoint to be valuable and that every team member makes a unique contribution to the project. Therefore it is important that each person speaks freely and that the others give respect to all points of view. If unequal participation becomes a problem, structure discussions so that everyone can contribute. Ground rules should indicate that not only does the team encourage participation, it expects everyone to actively participate.

Basic Courtesies

Everyone should agree to listen attentively and respectfully to others, not to interrupt, and to hold one conversation at a time (i.e., no side discussions).

Assignments

Much of a team's work is done between meetings. Members should agree that it is important that they complete assignments on time and understand that when they do not, it wastes the time of the others. Ground rules could specify whether assignments are completed and information distributed prior to the meeting where they will be used, or if assignments are simply brought to the meeting.

Interruptions

The members should decide when interruptions will be tolerated (perhaps during general discussions) and when they will not. This could include ground rules for turning off cell phones and pagers, or limiting access to members during the meetings (i.e. no interruptions from “home office” will be accepted).

Breaks, Eating, Drinking And Smoking

Decide in advance when to take breaks and how long they will be, and whether eating, drinking or smoking will be permitted.

Routine Chores

Decide who will be responsible for setting up or cleaning the meeting room and for other housekeeping chores, and how to rotate these duties among team members.

First Team Meeting

Before the first meeting, the leader should determine if there is a need for a coach (external or internal) to facilitate and/or train the team. If so, the coach and team leader should define how they will work together, as described in Module 2.

During the first team meeting, the team leader and team must:

- Review and discuss the team's overall objectives so that all the members agree on what their task is and what is important.
- Decide who will keep the minutes and records for each meeting. It can be one person for all the meetings, or the job can be rotated among the members.
- Decide who will be the timekeeper. It can be one person for all the meetings, or the job can be rotated among the members.
- Obtain team agreement about how meeting objectives and agendas will be set.
- Propose and decide on a set of ground rules about how meetings are run and how participants are to behave. These rules are designed to prevent misunderstandings and disagreements and each member is expected to respect them.
- Establish a general work plan for team activities.
- If a coach will be a member of the team, that role should be explained to the members.

In addition, if this team is going to start a QA project, such as a quality improvement team, it may be appropriate to include training on improvement topics during the first meeting. This may include discussion of improvement principles, the steps of QI, characteristics of effective meetings, or any other pertinent

topic.

Planning the Meeting

Effective meetings happen when teams:

- Plan their meetings.
- Follow steps necessary to conduct an effective meeting.
- Evaluate their meetings.
- Develop communications skills to accomplish meeting tasks.

Planning meetings includes determining the meeting objectives and creating the meeting agenda.

Meeting Objective(s)

Though the team's ultimate objective or purpose may be large and somewhat vague, each meeting needs at least one objective that has a specific, observable end result. The objective establishes the reason for the meeting. Meeting objectives answer the question, "What are we trying to accomplish?"

The purpose of meetings and thus, meeting objectives can be divided into the following categories:

- **Information Giving** is *one-way communication*. Team members listen to someone who is giving them information. Questions may be asked for clarity only - there is no discussion or decision to be made.
- **Discussion** is *two-way communication* that allows an opportunity for all team members to express their thoughts and ask questions.
- **Decision-making**. Decisions may be made by voting, consensus, or other methods. Decisions are based on information that was given and/or discussion that took place prior to or earlier in the meeting.
- **Task Oriented**. In task oriented meetings specific work is to be accomplished, such as drawing a flow chart, graphing data or creating an outline for a presentation.

If a meeting has more than one objective, the above classification can be used to determine the objective for each major agenda item. With the objective in mind, all discussion and energy can be directed toward it, thus ensuring that time is used efficiently and productively.

Meeting objectives also help the team plan its activities in an organized and purposeful manner. The objectives inform team members as to the appropriate behavior and interaction that should occur. By the end of the meeting the team should know whether or not the objectives were met.

Examples of meeting objectives are:

- To inform the team of changes in personnel policy. (Information).
- To discuss the pros and cons of extending clinic hours (Discussion).

- To decide on realistic goals for each health district (Decision).
- To construct a flow chart of patient flow through a maternal/child health clinic. (task oriented).

Meeting Agenda

An agenda is the most essential item for a meeting. It serves as a road map to keep the keep the meeting focused, productive, and headed in the right direction.

When developed correctly, an agenda can:

- Enable the team leader to maintain control of the meeting.
- Help team members prepare for the meeting.
- Keep team members focused on the objectives during the meeting.
- Guide the orderly progress of the meeting.

Ideally, all team members should have the opportunity to contribute to an agenda prior to the meeting. The agenda may be drafted at the end of one meeting in preparation for the next. It may be the responsibility of the team leader to solicit agenda items, and to prepare and distribute the agenda between meetings. If an agenda has not been prepared and distributed ahead of time, the team should take a few minutes at the beginning of the meeting to develop and post an agenda.

Most agendas are too brief. When well developed, an agenda defines and clarifies each agenda item. When developing an agenda, the team leader should include the following:

- **Logistics** of the meeting – where the meeting will take place, the date, the start and end times.

The meeting place can make a big difference in an effective meeting. When the meeting room is adequate, it goes unnoticed. However, if the room is too small, too cold, too dark, or too noisy, it will be difficult to conduct an effective meeting.

It is also important to choose the time of your meeting carefully. Avoid late afternoons before a holiday or weekend, or early morning meetings following a day off. Be willing to be flexible. Check the availability of participants, facilities, and preparation time required.

- **Sequence of agenda items** – what needs to be accomplished and in what order. When sequencing agenda items, the team leader should use his or her discretion and take team members and their issues into account. The team leader should:

Remember to state the objective of each agenda item (i.e., to inform, discuss, decide, or work)

Start with a unifying item that has most of the team's support and interest.

Include early items that are creative and likely to build interest and involvement.

Reserve a key item for last to keep interest high.

- **Who is responsible** –which team member (or guest) will present or facilitate each agenda item, and who will take minutes or keep a record of the meeting. If appropriate, a timekeeper may be designated.
- **Time line** - how long it will take to accomplish each agenda item.
- **Background material** – this material brings team members up to date and allows them to form questions in advance. Background material should be distributed with the agenda ahead of time.

Conducting the Meeting

Opening the Meeting

The team leader's opening and closing statements set the tone for the meeting and ensure that agreed actions are carried out. The leader should prepare an opening statement that will encourage a high level of participation and productivity.

The opening statement should:

- state the purpose of the meeting and what needs to be accomplished, and
- include a review of the agenda.

Following the Agenda

It's important that the team establishes ground rule that says they agree to follow the agenda. For example, if the objective of an agenda item is to inform - then that is what takes place; it would be inappropriate to engage in a debate or try to reach a decision when the sole purpose is to inform. Similarly if the objective is to discuss, it would be inappropriate for someone to force a decision. Likewise, if the objective is to make a decision, then at some point discussion must cease, and a decision must be taken.

A team may agree to change the agenda during the meeting, but all members must agree to the change.

Closing the Meeting

The skillful closing of a meeting ensures that all team members understand:

- If the meeting objective(s) has been accomplished.

- What has been agreed upon.
- How the next steps will be carried out.

The team leader should review for the group what the issues have been and confirm what each member has agreed to do before the next meeting. This summary – which can be a simple itemization of what the task is, who will perform it and when it will be completed – helps to ensure that everyone shares the same understanding of what has occurred and enables the team to be unified on the decisions and actions.

This may also be the time to set the agenda for the following meeting.

Evaluating the meeting

An important step at the end of each meeting is the evaluation of the meeting. This step is often overlooked until something goes wrong. It is important that the team has an opportunity to share perceptions of what happened in the meeting and to say what they would like to happen at the next meeting.

During the evaluation process team members should state:

- What behaviors they want to *continue*.
- What behaviors they want to *stop*.
- What behaviors they want to *start*.

For example, the team may say that they want everyone to:

- Continue bringing up difficult topics.
- Stop interrupting each other.
- Start giving positive reinforcement for tasks well done.

When this feedback is done honestly, the team can continue doing what team members find helpful while openly discussing what can be done to improve behavior that is inhibiting the team's progress.

It is important that the evaluation step be on the agenda and allotted approximately five to ten minutes. If for some reason there is not enough time, the team leader can distribute evaluation forms, telephone or visit members of the team to get their feedback. Deferring the evaluation to the next meeting should only be done as a last recourse.

Team Meeting Communication Skills

Active Listening

Active listening is a process in which the listener interacts with the speaker. It requires mental and verbal paraphrasing and attention to nonverbal clues like tones, gestures, and facial expressions. It is a process of listening not just to every word but also to main thoughts and references.

Active listening indicates to others that their contributions are respected and valued by the listener. Listening actively can be particularly helpful in working with people who have diverse opinions. A team whose members practice active listening usually is effective, and its members tend to be

eager to participate in meetings.

The process of active listening consists of the following:

- *Checking*: “Can I repeat what you said in order to check my own understanding?”
- *Clarifying*: “It seems to me that what you mean is...”
- *Showing Support*: “I hear you. Please continue.”
- *Building*: “To your last point I would like to add the following...”
- *Structuring*: “Shall we look at the symptoms, try to define the problem, and then discuss possible solutions?”

Teams whose members are not skilled in active listening tend to fall prey to the following:

- Dominance of the team by a few members.
- Cross-talk (several members talk at the same time).
- Lost ideas because no mechanism for identifying and recording information exists.
- Repetition.
- Wordiness (members speak at length but contribute little).
- Lack of consensus in decision making.

More information about active listening is included in Module 3: Communication Skills of this Reference Manual.

Assertiveness

The ability to communicate requires team members to become articulate and assertive in expressing their opinions and ideas. All too often, teamwork deteriorates because some members are unwilling or unable to communicate their ideas in a cogent or forceful manner. There is a difference between assertion and aggression: the assertive person wants his or her ideas to be heard and considered, whereas the aggressive person intimidates others into doing what he or she wants. The most successful teams consist of strong-minded people who work together without trying to dominate one another.

Assertive communication is characterized by the following:

- Information and opinions that are presented freely and clearly, with visual aids if needed to enhance clarity
- Challenges to any attempt to dominate the team.
- Dialogue and debate that occurs freely, ensuring that concepts and consequences are well thought out.

**References
and
Recommended
Readings**

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