

TEN STEPS TO EFFECTIVE MEETING MANAGEMENT

Meetings are essential to NORC program partnerships to achieve their shared goals. Not all meetings are inspirational, but they all must be effective. The following is a guide to help make meetings more effective:

1. Know the Reason for the Meeting

On the meeting notice and agenda, ***declare the purpose*** (the 'why') for the meeting. Reasons for most meetings can be found in these five purposes:

- To socialize, network, and build relationships (work gets done faster and more effectively when people know and trust each other.)
- To present information that cannot be presented in any other way (e.g. through individual conversations, in writing, or electronically).
- To obtain input and feedback from people in a setting that promotes greater richness of ideas through interaction.
- To make *group* decisions (as opposed to one person or small groups making the decisions and seeking input and feedback.)
- To celebrate success!

Once the purpose is established, ***identify the expected outcomes*** (the 'what') for the meeting. Any of the five purposes can have a number of specific outcomes. For example, the outcome of a meeting might be to leave with:

- A strategy on how to approach new clients or funders, or how to overcome a major problem.
- Knowledge about new products or services that will be applied directly to daily operations in specified ways.
- Decisions on how to apply resources and skills.
- Acknowledgement and celebration of everyone's contribution.

With purpose and expected outcomes identified, ***communicate the logistics*** (the "how") in advance:

- Purpose and outcomes for the meeting.
- The date it will happen, who is expected to attend, where it will be held, when it will start and end.
- What is to be covered: topics, tasks, decision items, time allocations, and breaks (this is the agenda).
- Who is responsible for which parts of the meeting.

This advance knowledge focuses the participants and ensures greater productivity during the meeting.

2. Identify a Facilitator

Effective meetings require a skilled facilitator. The facilitator is often the person who has called the meeting and/or is a leader in the partnership. NORC program partners need to decide who among them has the skills to run an effective meeting. In some cases the facilitator will be the program director. In other cases, this role may be filled by one of the other partner members, such as a community leader, senior resident, or agency partner executive.

3. Set the Stage

The meeting environment is important to planning effective meetings. Consider the following:

- *Choose the best location possible.* Given the strategic direction of the partnership and the purpose and outcomes of the meeting, decide if the meeting should always be held in the same place because it is central, known, convenient, or parking is easy. Or, decide that the meeting should be held in different locations to balance inconveniences, manage turf issues, or avoid work-related interferences.
- *Offer refreshments.* If the meeting is longer than an hour and a half, then refreshments are necessary. If the meeting is to tap people's creativity, then provide food, beyond coffee and tea. If the meeting is to celebrate success, then some memento, however small and inexpensive, goes a long way to honoring contributions.
- *Match room set-up to meeting type.* If interaction is desired, people have to be able to see each other. Seat them around a table (for small meetings) or around a square "donut" of tables (for larger meetings). If the purpose is solely to present information, classroom style may be more appropriate. If creativity is desired, seat participants close together at the table or break them into small groups to generate ideas before bringing the information back to the larger group.
- *Start on time.* Begin the meeting by establishing a friendly atmosphere. Welcome people, provide opportunity for introductions, review the purpose, outcomes of the agenda, and approve the meeting record from the previous meeting, if needed. Then get down to business.

4. Create the Context

Meetings are steps to fulfilling the mission of the partnership. Therefore, meetings are most effective when the partners are reminded of this mission. Some programs attach their mission statements to each meeting agenda, while others have it as a tag line on their program's logo. This helps remind partners of the NORC program's purpose at all times.

5. Set the Ground Rules

Ground rules help to manage group behavior and interaction. Without them, discussion may not be focused, the agenda not completed, and people may leave frustrated. Ground rules need to be developed and agreed upon at the beginning of the meeting. Here are some examples:

- Pagers, cell phones, and other electronic devices should be silenced during the meeting.
- The group should employ a jargon alert flag. Anytime someone doesn't understand a term being used, they can say "jargon alert" and the speaker will define the term.
- All meetings should have a time for "new" or "other" business. This helps ensure that all needs will be addressed at the end of the meeting or at a future meeting.
- The group should determine other ground rules. Some may include timeliness and confidentiality.

6. Ensuring all participants have a voice

A skilled facilitator understands that people participate at different levels. The facilitator should seek to balance the contributions and input from the meeting participants. A skilled facilitator may need to limit some of the more vocal people, while encouraging input from the quieter participants at the meeting.

7. Keep the discussion focused.

To ensure that the meeting ends on time, the facilitator must keep conversation focused on the agenda items and the time allotted for each topic.

8. Keep Action Minutes/Meeting Record

Action minutes track what is accomplished, not what is said. Action minutes record the steps taken at a meeting to achieve the strategic goals of the NORC program partnership. Action minutes cover five crucial elements including attendance, decisions made, responsibilities assigned, progress made, and purpose of the next meeting.

An archive of action minutes ensures the following:

- A complete record of progress (or lack of progress) on particular issues is available for all to read.
- Information can be tracked not only by meeting date, but also by participation, decisions, responsibility, and progress.
- Accomplishments can be ensured because it's difficult to say: "I didn't understand what was expected."
- Success can be celebrated and people can be recognized for their contribution to the success because progress, and those responsible for it, are described in the action minutes.

9. Summarize the meeting and celebrate accomplishments

At the end of every meeting, summarize what was accomplished. Verbally agree on what was decided, who is responsible for next steps, and what will be included at the next meeting.

10. End on time and close the loop

Get action minutes back quickly to everyone.