



CHAPTER 10

PLANNING AND CONDUCTING MEETINGS

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- ▶ There are more than 11 million business meetings in the U.S. every day.
 - ▶ Most employees spends 15 hours per week in meetings.
 - ▶ Most employees attend 60 meetings a month.
 - ▶ Many meetings are not productive or rewarding group experiences.

TOO MANY MEETINGS

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- A photograph showing several people seated around a light-colored wooden conference table in an office setting. There are water bottles and coffee cups on the table. In the background, there's a window with blinds and some framed pictures on the wall.
- ▶ The meeting was unnecessary.
 - ▶ The meeting wasted time.
 - ▶ The meeting didn't use/follow an agenda.
 - ▶ Members are unprepared.
 - ▶ The right people are not at the meeting.
 - ▶ The meeting accomplishes nothing.
 - ▶ Members fail to follow up after the meeting.

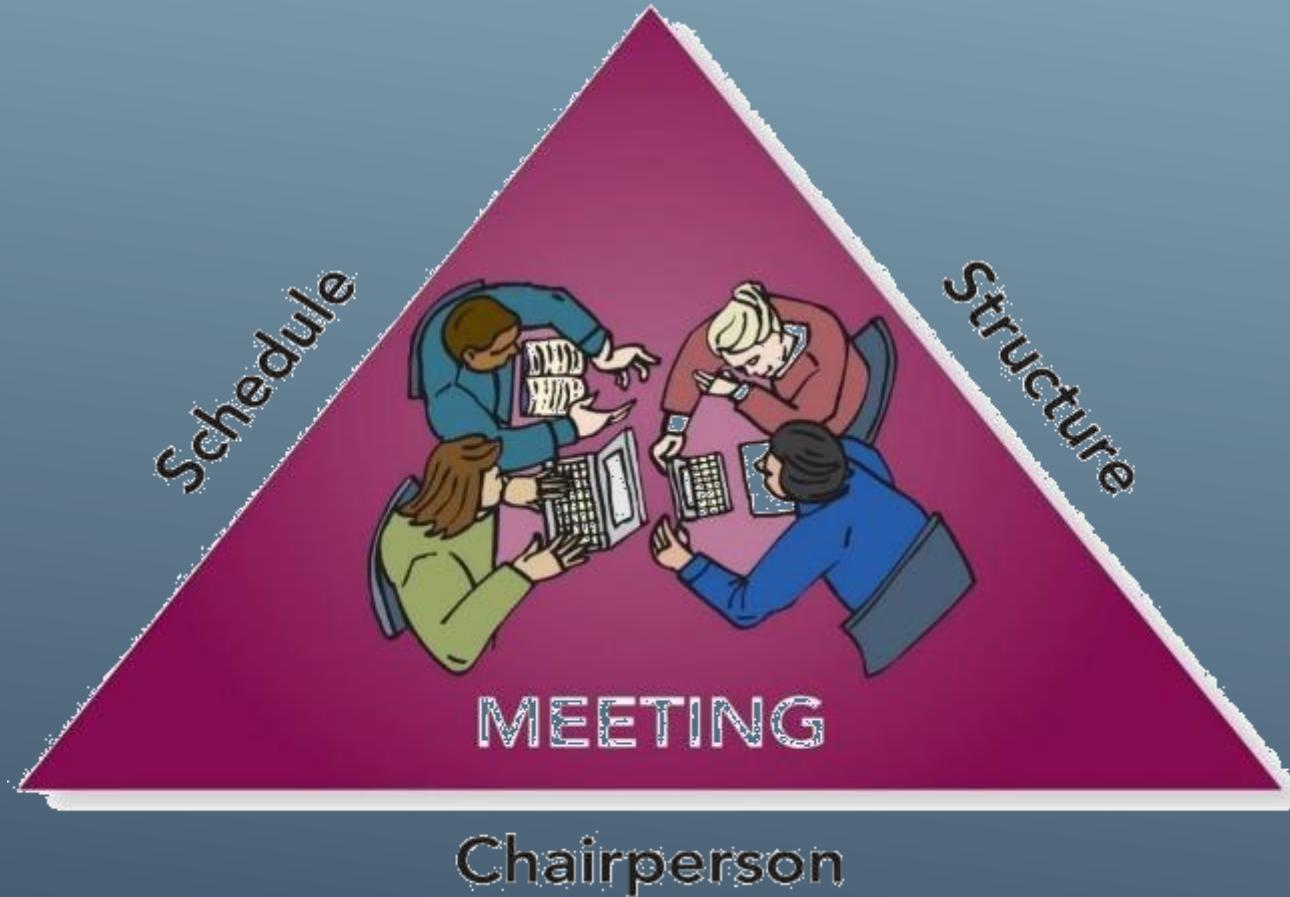
WHAT' WRONG WITH MEETINGS?

Meeting

A scheduled gathering of group members
for a structured discussion guided by a
designated chairperson

WHAT IS A MEETING?

ESSENTIAL MEETING ELEMENTS



- ▶ Why are we meeting?
- ▶ Who should attend the meeting?
- ▶ When should we meet?
- ▶ Where should we meet?
- ▶ What materials do we need?

QUESTIONS FOR PLANNING A MEETING

MEETING TYPE	PURPOSE	EXAMPLE
Information - Sharing Meeting	Provides members with the opportunity to exchange information relevant to group goals	The staff of an arts organization meets to share information about the level of enrollment in summer arts courses.
Instructional meeting	Provides members with the opportunity to learn or improve a specific skill or knowledge area relevant to the common goal	The faculty members at college meet to learn how to use new course management software.
Problem-Solving Meeting	Provides members with the opportunity to analyze a problem and develop a plan of action for solving or reducing the impact of a problem relevant to the common goal	The Board of Directors of a non-profit organization meets to revise an outdated mission statement.
Decision-Making Meeting	Provides members with the opportunity to make a judgment, choose an option, or make up their minds about something relevant to the common goal	The members of a planning committee meet to choose the date and place for the annual fundraising gala.

► Why are we meeting?

- Is an immediate decision or response needed?
- Are group input and interaction critical?
- Are members prepared to discuss the topic?
- What is the purpose of the meeting?

“...phone calls, memos, emails, or voicemails could have replaced 25% of the meetings.”

Barbara Streibel, *The Manager's Guide to Effective Meetings*
(NY: McGraw-Hill, 2003), p.165

QUESTIONS FOR PLANNING A MEETING

► Who should attend the meeting?

- Will the member contribute useful information or insights during the discussion?
- Will the member actively participate in the meeting?
- Is the member committed to achieving the group's common goal?
- Are the selected members available at the designated meeting time?
- Are diverse points of view represented?
- Are important decision makers and implementers represented?

- The size of the group should be manageable:
 - ≤12 participants;
 - A group of 5 to 7 members is ideal for problem-solving sessions.

QUESTIONS FOR PLANNING A MEETING

► When should we meet?

- Avoid Friday afternoon meetings when energy and enthusiasm may be low.
- Avoid meetings immediately after lunch when members may be sluggish.
- Avoid early morning meetings that make it difficult for members to arrive on time.
- Avoid scheduling group meetings near holidays or at the beginning of the week.

**QUESTIONS FOR
PLANNING A MEETING**

► Where should we meet?

Type of Location	Advantages	Disadvantages
Leader's Office	Convenient; access to materials and resources; enhances the meeting's importance	Members may feel like "guests" rather than equals; subject to distractions
Member's Office	Convenient; access to materials and resources; boost the member's status	Subject to distractions; maybe a small cubical with cramped seating
On-site Meeting Room	Avoids distractions of a working office; more spacious and comfortable than an office	Subject to interruptions; distant from materials and resources; may be time limits on use
Off-site Meeting Room	Eliminates most distractions; provides time; neutral territory; more attractive and comfortable	Costly in terms of room rental and travel distant from materials and resources

- Choose an appropriate location & room size
- The room should be large enough, clean, well lit, not too hot or too cold, with chairs.

QUESTIONS FOR PLANNING A MEETING

► What materials do we need?

The most important item to prepare and distribute to group members prior to a meeting is **an agenda**, a document outlining what topics will be discussed and in what order. The chairperson should also distribute **essential reading materials** to every member and make sure that needed supplies and equipment, such as **markers, paper, flip charts, projectors, computers, and WiFi**, are available to all participants.

QUESTIONS FOR PLANNING A MEETING

POWERPOINT QUIZ

Which 2 group dialectics are most relevant when planning and conducting meetings?

- a) structure ↔ spontaneity AND leadership ↔ followership.
- b) individual goals ↔ group goals AND conformity ↔ nonconformity.
- c) heterogeneous ↔ homogeneous AND conflict ↔ cohesion.
- d) engaged ↔ disengaged AND open system ↔ closed system.

THE NEED FOR AGENDAS

Agenda

The outline of items to be discussed and tasks to be accomplished during a meeting

An agenda . . .

- is an organizational tool.
- helps members prepare for a meeting.
- is a time management tool.
- provides a measure of success.

A BUSINESS MEETING AGENDA

- Purpose of Meeting
- Names of Group Members—present or absent
- Date, Time, and Place
- Call to Order
- Approval of the Agenda
- Approval of Previous Meeting's Minutes
- Individual and Committee Reports
- Unfinished Business
- New Business
- Announcements
- Adjournment



Recycling Task Force

November 20, 2009, 1:00 P.M. – 3:00 P.M.

Conference Room 352

Purpose: To recommend ways to increase the effectiveness of and participation in the company's recycling program.

- I. What is the goal of this meeting? What have we been asked to do?
- II. How effective is the company's current recycling effort?
- III. Why has the program lacked effectiveness and full participation?
- IV. What are the requirements or standards for an ideal program?
 - A. Level of Participation
 - B. Reasonable Cost
 - C. Physical Requirements
 - D. Legal Requirements
- V. What are the possible ways in which we could improve the recycling program?
- VI. What specific methods do we recommend for increasing the recycling program's effectiveness and level of participation?
- VII. How should the recommendations be implemented? Who or what groups should be charged with implementation?

SAMPLE DISCUSSION AGENDA

POWERPOINT QUIZ

When is the best time to address important and difficult issues in a meeting?

- a) At the beginning of the meeting
- b) During the middle portion of the meeting
- c) During the last third of the meeting
- d) At the end of the meeting

CHAIRPERSON'S PRE-MEETING TASKS

- Notify members
- Distribute materials
- Remind members
- Prepare for discussion

CHAIRPERSON'S TASKS DURING THE MEETING

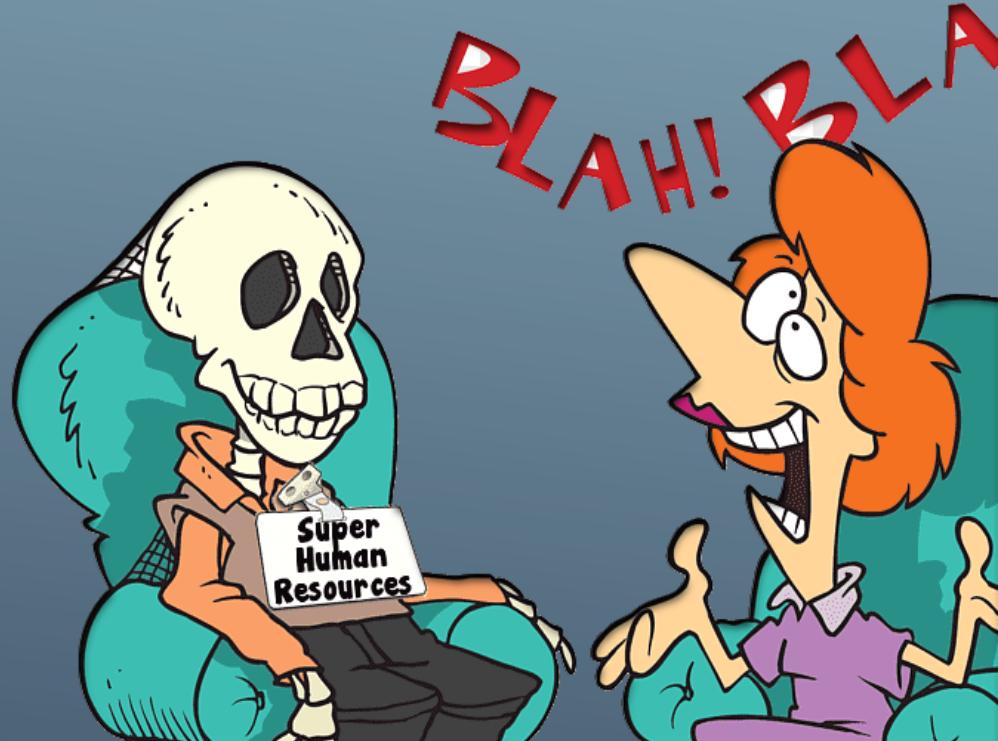
- Begin on time
- Delegate meeting minutes
- Follow the agenda
- Facilitate the discussion
- Provide closure

CHAIRPERSON'S POST-MEETING TASKS

- Evaluate the meeting
- Distribute the meeting minutes
- Monitor assigned tasks

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- Non-participants
 - Loudmouths
 - Interrupters
 - Whisperers
 - Latecomers
 - Early Leavers

COMMON DISRUPTIVE BEHAVIORS



- Acknowledge that you understand their positions.
- Interrupt them and shift the focus to other members.
- Tell them the group needs input from everyone.
- Assign them side-line tasks (e.g., taking minutes) that shift them from talking to listening and writing.

DEALING WITH LOUDMOUTHS

HOW TO DEAL WITH DISRUPTIVE BEHAVIORAL PROBLEMS

- **Nonparticipants:**
 - Analyze why such members are not participating.
 - Provide opportunities for reluctant members to become involved in the discussion.

- **Interrupters:**
 - Interrupt the interrupter by intervening them and say, “Let Andy finish his point first, and then we’ll hear other viewpoints.”

HOW TO DEAL WITH DISRUPTIVE BEHAVIORAL PROBLEMS

- **Whisperers:**
 - Use directing eye contact toward sideline conversations
 - Ask the talkers to share their ideas with the group.
- **Latecomers and Early Leavers:**
 - Start the meeting at the scheduled time.
 - Do not waste meeting time. Let them sit without participating until they have observed enough to contribute to the discussion.
 - Talk to them after the meeting about the importance of attending the entire meeting.

“The more you make a practice of waiting for people, the more likely people will continue to arrive to meetings late.”

Glenn Parker and Robert Hoffman, *Meeting Excellence: 33 Tools to Lead Meetings That Get Results* (San Francisco, CA: Jossey-Bass, 2006), 42.

POWERPOINT QUIZ

If members are frequently late to meetings, the chairperson should . . .

- a) wait to start until all members have arrived.
- b) review what has been accomplished whenever a latecomer arrives.
- c) let latecomers sit without participating until they have observed enough to be able to contribute.
- d) publicly reprimand latecomers.
- e) assign latecomers tasks that he/she can/wants to do.

POWERPOINT QUIZ

In order to run a successful virtual meeting, you should. . .

- a) begin a virtual meeting by reading the meeting agenda out loud.
- b) invite more people to participate.
- c) make sure that all members have access to the technology and know how to use it.
- d) use technology you've used before, so you don't have to worry about testing it prior to meeting with the group.

*Deborah Duarte and Nancy Snyder,
Mastering Virtual Teams*

POWERPOINT QUIZ

The minutes of a meeting are . . .

- a) the written record of a group's discussion and activities.
- b) legal documents as well as historical records of organization business.
- c) a way to share what happens with members who don't attend.
- d) a way to prevent disagreement over member assignments and group decisions.

WHAT TO INCLUDE IN THE MINUTES

- Name of the group
- Date and place of meeting
- Names of attending members
- Name of the chair
- Names of absent members
- Time the meeting was called to order
- Time the meeting adjourned
- Name of person preparing the minutes
- Summary of discussion and decisions including *action items*

TAKING MINUTES

- Write clear statements that summarize the meeting's main ideas and actions.
- Word decisions, motions, action items, and deadlines exactly as the group makes them.
- If in doubt, ask the group for clarification.
- Attach the agenda and any reports to the final copy of the minutes.

GUIDELINES FOR TAKING MINUTES

- Report the facts and all sides of a discussion accurately.
- Never insert your own personal opinions.
- Be discreet. If the group determines that a portion of the discussion should be “off the record,” you should honor that decision.
- When in doubt, ask the group if an issue should be included or how to word it for the minutes.
- Always keep in mind that the minutes are a public record of the meeting.

SAMPLE OF INFORMAL MINUTES

Domestic Violence Class Discussion Group Meeting
February 10, 2009, in Library Conference Room 215

Present: Gabriella Hernandez (chairperson), Eric Beck,
Terri Harrison, Will Mabry, Tracey Tibbs

Absent: Lance Nickens

Meeting began at 2:00 P.M.

Group Topic: The group discussed whether emotional and verbal abuse should be included in the project. Since we don't have much time to do our presentation, we decided to limit the topic to physical abuse only.

Research Assignments: Since the assignment is due in two weeks, we decided to divide the issue into different topics and research them on our own.

Action: *Eric will research why people stay in abusive relationships.*

Action: *Gabriella will research the effects on the children.*

Action: *Terri will find statistics and examples of the seriousness of the problem.*

Action: *Will is going to find out why and how the abuse happens.*

Action: *Tracey will find out what resources are available in the area for victims.*
Members will report on their research at the next meeting.

Absent Members: Lance has not been to the last two class meetings. We don't know if he is still going to participate in the group. Action: *Gabriella will call Lance.*

Class Presentation: We need to think of creative ways to make a presentation to the class. The group decided to think about this and discuss it at the next meeting.

Next Meeting: Our next meeting will be at 2:30 on Tuesday, February 14th, in the same place. Action: *Terri will reserve the room.*

The meeting ended at 3:15 P.M.

(Meeting notes taken by Tracey Tibbs)

PARLIAMENTARY PROCEDURE

A set of formal rules used to determine the will of the majority through fair and orderly discussion and debate



Purpose of parliamentary procedure:
To protect the rights of minority members while ensuring majority rule

BASIC PRINCIPLES OF PARLIAMENTARY PROCEDURE

- Majority Will
- Minority Rights
- Balanced Discussion
- Orderly Progress



ORDERLY PROCESS

- Only one person may speak at a time.
- Only one proposal or subject may be discussed at a time.
- Members must limit their remarks to the topic under discussion.
- Although the chairperson has the primary responsibility for enforcing the rules, all members share that responsibility.
- A group may not make a decision unless the meeting is properly called and the rules of parliamentary procedure are followed.



PASSING A MAIN MOTION

- Make the motion. Present a proposal to the group: “I move that we go to lunch.”
- Second the motion. A main motion must be seconded .“I second the motion.”
- Amend the motion. A main motion can be amended: “I move that we go to lunch at 12:30 pm.”
- Voting. The group decides whether to accept or reject the motion: “All those in favor say aye. All those opposed say nay.”

POST-MEETING EVALUATION

- Was the meeting's goal clear?
- Was the agenda useful and followed?
- How prepared were group members?
- Did everyone have an equal chance to participate?
- Did members listen effectively and consider different points of view?
- Were assignments and deadlines made clear by the end of the meeting?

ADDITIONAL EVALUATION QUESTIONS

**What other evaluation questions would you add to those
on the previous slide?**

- Example: Did the meeting begin and end on time?
- Example: How clear was the goal of the meeting?
- Example: How prepared were group members for the meeting?
- Example: Did members listen effectively and consider different points of view?