

# Effective Meeting Management

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*Tips To Keeping Calm, Collected and In Control of Your Meeting*



**ONE DOES NOT SIMPLY**



**HAVE A MEETING**



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# Effective Meeting Management

- Purpose of Training
- Golden Rules of Meeting Management
- Components of A Successful Meeting
  - Pre-Meeting Work
  - Meeting Facilitation
  - Post-Meeting Work
- Key Takeaways



# Why Do We Meet?

- A meeting is a gathering of two or more people that has been convened for the purpose of achieving a common goal through verbal interaction, such as sharing information or reaching agreement.

SOUNDS SIMPLE, RIGHT?



# Why Do We Meet?



# Exercise

- What was the worst meeting you have ever lead or attended?
- What was the most effective meeting you have ever lead or attended?

# Effective Meetings



# Golden Rules of Meeting Management

## ■ Rule #1: Do Unto Others

- Run your meetings as you would have others run the meetings that you attend.
- Most fundamental rule of meeting management.
- All other Golden Rules of meeting management flow from this principle.



# Golden Rules of Meeting Management

## ▪ Rule #2: Be Prepared

- Distribute agenda at least a day before the meeting.
- Participants should review and arrive prepared.
  - No one should arrive at a meeting not knowing what is supposed to be accomplished.
- If there is nothing for the agenda, ask yourself whether there really needs to be a meeting.

# Golden Rules of Meeting Management

- **Rule #3: Stick to a Schedule.**
  - Start and END on time.
    - Requires discipline.
    - Build in chit-chat time to agenda
  - Keep the agenda realistic.
  - Consider the timing of meetings.
    - Know your audience/participants

# Golden Rules of Meeting Management

## ■ Rule #4: Stay On Topic

- Avoid tangents
  - All meeting participants have the responsibility of guiding the meeting back to the substantive agenda items.
- Storytelling can be useful if it is being used deliberately as a mentoring, team building or teaching tool.

# Golden Rules of Meeting Management

## ■ Rule #5: Be Deliberate With Meetings

- Meetings are crucial for maintaining good communication, but it is important to find the right balance between good communication and productive uses of time.
- Assess how often meetings *really* need to be held.
  - Frequency, purpose, length, etc.

# Golden Rules of Meeting Management

## ▪ Rule #6: Wrap Up & Follow Up

- Verbally summarize what needs to be done and who is going to do it.
  - Do not let participants leave the meeting with no direction on decisions that were made and action to be taken.
- Ensure that minutes of the meeting are distributed within a reasonable timeframe.

# Effective Meetings: Agenda

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# Effective Meetings: Agenda

## ■ Purpose of An Agenda

- A list of meeting topics in the order in which they are to be taken up
- May include one or more specific items of business to be acted upon.
- Used to ensure order of the meeting.

# Effective Meetings: Agenda

## ■ Building An Effective Agenda

- Call For Agenda Items
- Determine Objective
  - Be Realistic
  - Prioritize topics from most important to least to ensure the most important get covered.
- Timing and Assigning
- Review, Reorder, Review, Reorder – Repeat
- Attach Materials
- Send Out At Least **24 Hours** In Advance



# Effective Meetings: Agenda

NOW FOLLOW IT!!!!

# Effective Meetings: Robert's Rules



"Everyone here? Good. Meeting topic: Setting world record for shortest meeting. All in favor say aye. Ayes have it. Meeting over."

# Effective Meetings: Robert's Rules

## ■ Robert Who?

- Henry M. Robert, US Army General/Engineer
- First edition: 1876

## ■ Purpose

- Make it easier for people to work together effectively and to help groups accomplish their purposes.
- All members have equal rights, privileges and obligations.
- Guides group through Bylaws of organization.



# Effective Meetings: Robert's Rules

“The greatest lesson for democracies to learn is for the majority to give to the minority a full, free opportunity to present their side of the case, and then for the minority (....) to submit and to recognize the action as that of the entire organization, and cheerfully to assist in carrying it out ....”

- Henry M. Robert

# Effective Meetings: Robert's Rules

## ■ Responsibilities

- President/Chair must use her authority to ensure that all people attending a meeting are treated equally.
- President/Chair must ensure that time is used wisely.
- While majority vote decides an issue, rights of the minority must be protected.
- Personal comments/attacks are not permitted.
- President/Chair only votes to break a tie – *based on Bylaws of organization.*

# Effective Meetings: Robert's Rules

## ■ Provides For Flexibility

- Meeting objective.
- Size of group.

## ■ Process

- Any motion for action must have a second to be considered.
  - *Only after a second will the motion be brought to the floor for discussion.*
- Every matter presented for decision should be discussed fully.
- Voting.

# Effective Meetings: Robert's Rules

- **Order of Business**
  - Approval of Minutes
  - Reports
  - Unfinished Business
  - New Business
  - Adjourn

# Effective Meetings: Robert's Rules

## ■ Voting

### – Process

- Acclimation (*General Consent*)
- Roll Call
- Show of Hands

### – In tie, motion is defeated

- See Bylaws of organization





# Effective Meetings: Robert's Rules

## ■ Motions

- One Motion Considered At A Time
- Actions For Motions
  - Amend
  - Postpone
  - Refer
  - Approve
  - Kill

# Effective Meetings: Robert's Rules

## ■ Key Phrases

- Motion to Approve
- So Moved
- Second
- Discussion
- Friendly Amendment
- Point of Order
- Move to Reconsider
- Move to Refer
- Move to Table
- Call The Question
- All In Favor
- All Opposed
- Abstention
- Aye
- Motion Carries
- Motion Fails
- Adjourned

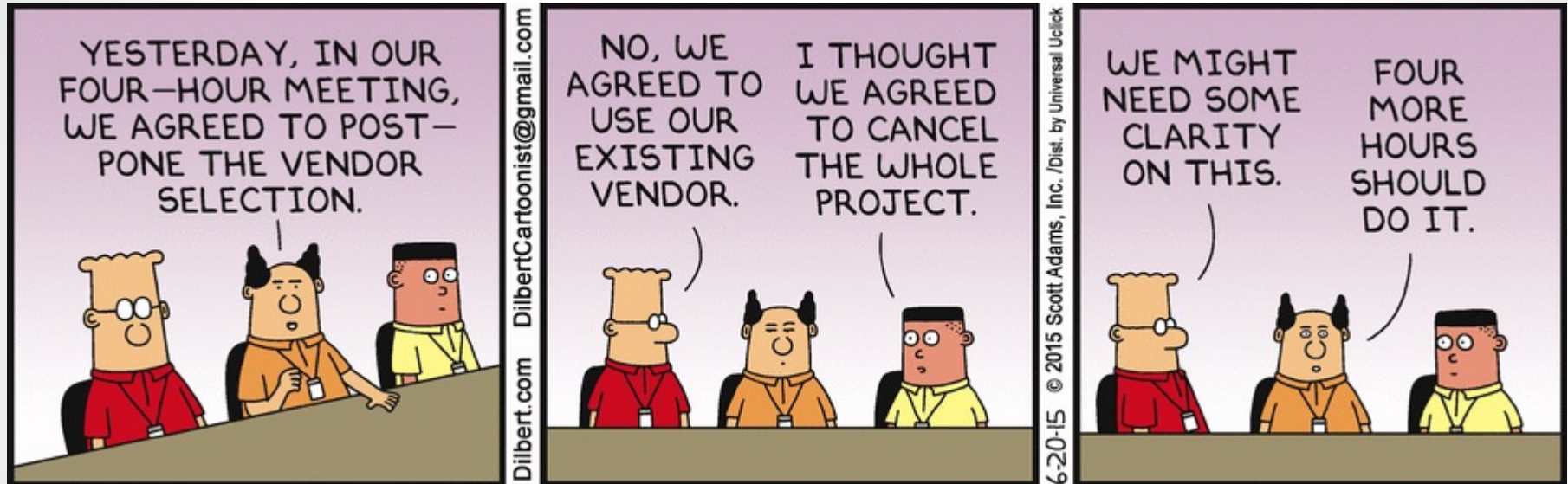


# Effective Meetings: Robert's Rules

## ■ In A Nutshell

- Make Motions – that are in order.
- Speak – clearly and concisely.
- Obey – the rules of debate.
- And most of all, be courteous!

# Effective Meetings: Minutes



# Effective Meetings: Minutes

## ■ Purpose

- The record of deliberations and decisions of a duly constituted committee, task force, working group, etc.
- Accurate record of an officially convened meeting.
- Along with agenda provides a long-term or permanent record of the proceedings, both for members and, where appropriate, for those who were not in attendance.

# Effective Meetings: Minutes

## ■ What To Include

- Minutes should be written as soon as possible following the meeting.
- Present the discussions neutrally, giving appropriate emphasis to arguments on all sides of the discussion.
- Meeting date, time and location
- Name of the committee holding the meeting.
- List of attendees and committee members absent.
- A record of formal motions and outcomes

# Effective Meetings: Minutes

- **What NOT To Include:**

- Direct Quotes

- Opinions

- While there are some exceptions, the general rule is to use a passive voice to summarize the main points raised in the meeting.

# Effective Meetings: Minutes

## ■ Sample Language

- It was VOTED 9-0-1 (*Cindy Reinhard absent; Jaynee Nadolski abstained*) to approve the August Board Meeting Minutes.
- In the discussion about X the following points were raised...
- Those in favor of the motion elaborated on the rationale and, in response to a question, gave assurances that...Those opposed to the motion raised concerns that....



# Effective Meetings: Minutes

## ■ Hot Tips

- Focus on action items, not discussion. The purpose of minutes is to define decisions made and to record what actions are to be taken.
- Write in the same tense throughout and avoid using people's names. This is a business document, not about who said what.
- Dull writing is the **key** to appropriate minutes.
- Don't force yourself to write the minutes in the actual chronological order of the discussion - it may not work.
- Use a template and have it ready during the meeting.

# Effective Meetings: Takeaways

- Golden Rules of Meeting Management
  - Do Unto Others
  - Be Prepared
  - Be Realistic
  - Avoid Tangents
  - Assess If Meeting Is Needed



# Effective Meetings: Takeaways

- Components of A Successful Meeting
  - Agenda Building
    - Determine Objective
    - Review, Reorder, Repeat
  - Robert's Rules
    - Based on Size/Objective
    - Flexibility
  - Minutes
    - Passive and Dull
    - Summarizes Meeting
    - Complete ASAP



# Effective Meetings: Takeaways



# Effective Meetings: Takeaways



# Effective Meetings: Takeaways

You  
Got  
This



# Effective Meetings: Questions?



**YOU GET A MEETING. AND YOU GET A MEETING.**

2004



**EVERYONE GETS A MEETING!**

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