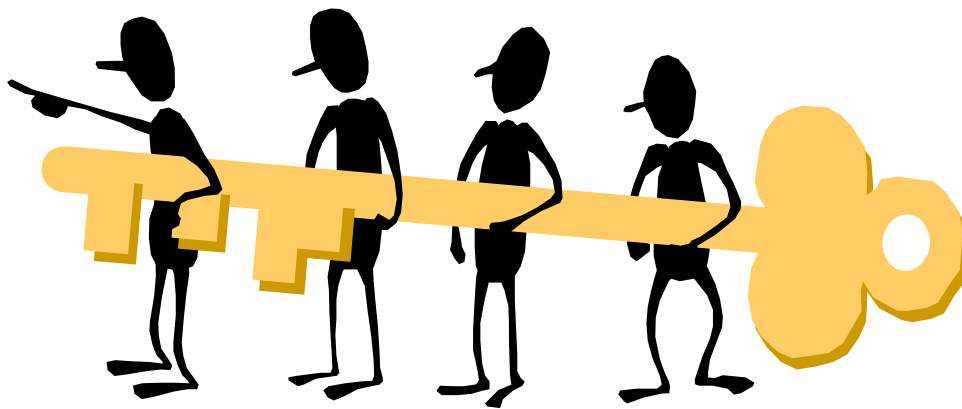


The Keys to Effective Club Meetings



ATC--Southern Highlands 2005
Johnson City, TN
July 2, 2005

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Nancy Walters is an internal consultant to the Forest Service Southern Research Station providing organization development services and specializing in meeting design and facilitation. In her 30 years with the Agency her facilitation, design, and consulting skills have contributed to effective meetings at all levels and across all branches of the Agency. She has skillfully brought diverse groups together to develop strategic and operational plans, guided Agency executives to critical decisions, and helped groups become high-performing teams.

Nancy's formal education includes a bachelor's degree in forest management from Colorado State University, and an Organization Development Certificate from National Training Labs.

During recent years Nancy has turned her passion for effective meetings toward training others in the skill of meeting management and facilitation. She conducts customized training in "Designing and Leading Effective Meetings" for Forest Service employees and partner organizations.

Workshop Objectives

At the end of this workshop you will know how to:



Plan and Prepare for Meetings

- Develop agendas that meet meeting goals and
- Consider meeting logistics and arrangements



Effectively Conduct Meetings

- Use appropriate problem-solving and decision-making techniques for the task
- Manage the dialogue, including difficult situations and people
- Get the most out of the diversity in the group

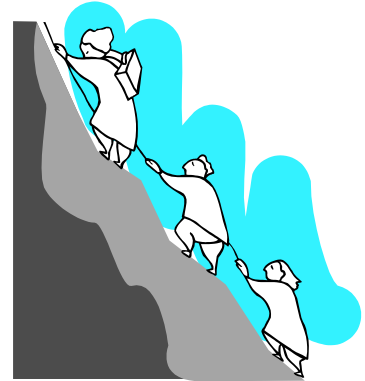


Provide Clear Closure to Meetings

- Ensure follow-up to commitments made

Why are some meetings like hiking UPHILL?

Think of a recent Club Meeting you attended or lead. List some of the characteristics that frustrated you or that feel contributed to the meeting's success. Jot them down here.



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Club Meetings: Purpose and Roles

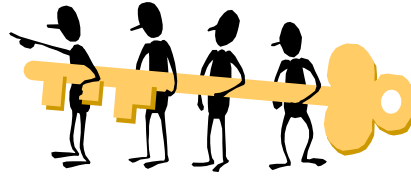
Why have Club Meetings?

What's the difference between content and process?

Process Roles to think about:

- Building an agenda
- Keeping the discussion focused
- Managing the dialogue
- Watching the time
- Bringing topics to a close (with a decision, next step, or just ending the discussion)
- Taking meeting notes

3 Keys to Effective Club Meetings



1. Thorough Preparation

2. Focused Conversation

3. Clear Closure



Key # 1: Thorough Preparation

Build an Agenda

- The Topics
- The Purpose
- The Order

- Meeting Length, Time, and Frequency

Arrange for the Place

- The Place
- The Set-up
- Equipment and Supplies
- Refreshments

Publicize

- Consider the meeting purpose and who should attend
- Use media appropriate for the attendance desired

Topic Preparation

Asking a few important questions about each suggested topic:

- *Helps cull inappropriate meeting topics*
- *Forces the topic leader to think through what he/she is hoping to accomplish*
- *Gives attendees a clue about what is expected of them*

Prepare for each Topic:

1. Topic Title:
2. Topic Leader:
3. Purpose:
4. Outcome Desired:
(e.g., a decision, a list of ideas, information only, etc.)
5. Estimated time:
6. Focus Question:
(for any topic where discussion is needed)
7. Handouts needed:



Key #2: Focused Conversation

Take time for Openings (pg.10)

- Provides transition from social chatter to business
- Sets expectations so attendees will relax and pay attention

Use the Appropriate Decision Method and Group Process (pg. 11-15)

- Clarify or set the decision method you will use.
Contention around decisions made can often be traced back to the method used more than the decision itself.
- Use a group process tool that fits the objectives of your topic.

Manage the Dialogue (pg. 16-18)

- Practice tips for keeping meetings focused
(See bonus handout on tips for conference calls)

Deal with Challenging Situations (pg. 19-21)

- Conflict is inevitable when people work together, and can be good if the goal is to get the most out of the diverse values, perspectives, and opinions of the club members
- Club members appreciate a leader who will provide meeting guidance and handle conflicts as they arise

Possible Topics for Opening Comments

1. **Goals:** The “why we’re here” statement.
2. **Roles:** Who will manage the dialogue, take notes, watch the time, etc.
3. **Process:** A quick review of the agenda and a query to see if anything else needs to be covered.
4. **Interaction Guidelines:** Suggestions for behaviors, actions, and attitudes that contribute to successful meetings.
5. **Logistics:** The low-down on refreshment breaks, meals, restrooms, phones, etc.
6. **Introductions:** Short and sweet, or longer to provide more information, depending on the objectives of the meeting.

Examples of Group Process Tools

Generating Ideas:

Brainstorming

A process for creatively and efficiently generating a lot of ideas in a group setting.

Idea (Individual) Writing

A brainstorming process done in silence and on paper.

Delphi

An iterative brainstorming process that can be done remotely.

Structured Round

A process for ensuring that everyone has a chance to speak and be listened to on a topic.

T-Charting

A way to organize a brainstorm into categories.

Analysis of Ideas:

Force-Field Analysis

A tool to help identify factors in place that support or work against the solution of an issue so that the positives can be reinforced and the negatives reduced or eliminated.

Visioning

Any number of processes that assist a group in articulating a desired future condition for a group or situation.

SWOT Analysis

A process often used in Strategic Planning and Visioning that identifies Strengths/Weaknesses/Opportunities/Threats of an organization and its environment.

Nominal Group Technique

Allows a group to quickly come to a consensus on the relative importance of issues, problems, or solutions by using a combination of brainstorming, organizing, and ranking.

Flowcharting

A way to identify the actual flow or sequence of events in a process that any product or service follows. Flowcharts can be applied to anything from the travels of an invoice or the flow of materials, to the steps in making a sale or servicing a product.

Mind Mapping

A free-flowing way to brainstorm and associate ideas simultaneously.

Cause and Effect Fishbone

A process that allows a group to identify, explore, and graphically display, in increasing detail, all of the possible causes related to a problem or condition to discover its root cause(s). The cause categories vary, but usually include people, machinery, equipment, methods, materials, policies, environment, and measurement.

Affinity Diagram

A process that allows a group to come up with a large amount of material without concern for categories or interrelationships and then arrange them to show which items have affinity (a natural relationship or likeness) to one another.

Problem Solving:

Outcome Model

An approach to problem solving based on the theory that if you lean into what isn't working well you will "pop out of it" into the desired outcome.

Appreciative Inquiry

An approach to problem solving that focuses on past experiences and future images of the organization, at-its-best, to define actions.

What works well/what needs improvement

An easy construct for getting to the core of what needs more discussion.

Getting to Decision:

Ranking/Rating

Any number of methods for narrowing down the possibilities generated in a group, such as:

- N/3 method
- Red/Green/Yellow Light method
- Weighted multi-voting (or distributing points) method
- Gradients of Agreement
- Levels of Consensus

Brainstorm and Rank

What is it?

A process for creatively and efficiently generating a lot of ideas in a group setting and then narrowing them down to a few.

What's so good about it?

- It encourages open thinking.
- It's highly participative.
- It allows participants to build on each other's creativity while staying focused on the question at hand.

What's the outcome?

A ranked list of creative ideas.

How do I do it?

Step 1: State the brainstorm question.

Post it for all to see.

Make sure it is understood, and reword if necessary.

Step 2: Review the rules for brainstorming:

Let ideas flow freely

No evaluating ideas

There are no bad ideas

No boundaries (or if so, state them)

Think creatively (and even crazily)

Work at a quick pace

Everyone participates

Remind folks they'll have a chance to ask clarifying questions and evaluate ideas later.

Step 3: Ask participants to let their ideas flow.

The actual brainstorming can be spontaneous (people offer ideas as they come to mind), or structured (go systematically around the group, giving participants the option to pass). It's sometimes a good idea to give the group a few minutes to think quietly and jot down ideas first (particularly if there are introverts in the group).

- Step 4:** Write each contribution on a flipchart using the same words as spoken. Keeping up with the pace is more important than being neat or spelling words correctly. Work with people that have lengthy ideas to help them shorten them, but be sure the shortened version accurately represents their idea. **Note:** It's easy to fall into discussion for clarification or understanding, but keeping the pace up is important for building the energy around creating and building on other's ideas. Resist it!
- Step 5:** When all the ideas are up, conclude the brainstorm. The process is usually short: 5-20 minutes, depending on the complexity of the topic. Don't stop too soon, though, sometimes the best ideas emerge with a "second wind".
- Step 6:** Review every item on the list making sure each is clearly understood. If there are identical ideas, eliminate them. Combine like ideas only with permission of the people offering the ideas. Give each item a letter (A-Z), not a number, to avoid confusion when you note the # of votes for an item.
- Step 7:** Do a consensus rank to find the group preference. Identify the criteria by which the group will be asked to rank, such as "most important", or "I like the most." Divide the number of items in the list by three and ask the participants to choose that number of items. For instance, say, "Out of this list of 24 items on the wall, jot down the letters of the 8 items you think are most important?" The items they choose are not to be ordered, just listed. As you run through the list one-by-one, have them raise their hand if that item is on their list. The result is a ranked list of items. If there is a tie for first and you must choose one, repeat the ranking process.

Group Process Exercise

Practice the Brainstorm and Rank process using this hypothetical meeting situation.

Members of the Happy Trails Hiking Club have convened at their spring meeting. The agenda includes the following topic:

Topic Title: National Trails Day

Topic Leader: Joe Hiker

Purpose: To decide what we want to do for National Trails Day. The American Hiking Society has provided us with general information about the day, but we need to decide if our club is going to sponsor any activities.

Outcome Desired: A decision.

Estimated time: 30 minutes

Focus Question:

“What should we do to celebrate National Trails Day?”

Follow the steps in the Brainstorm and Rank handout on page 13-14 to choose an activity appropriate for this Club.

Remember, this is hypothetical. Have fun with it!

Tips for Keeping Meetings Focused

1. Use and refer to an Agenda
2. Assign a Timekeeper
3. Post and use a Bin List (parking lot)
4. Use Focus Questions
5. Keep a running Action List
6. Structure the dialogue (raise of hands, queue)

Tips for Successful Conference Calls

Conference calls can be an efficient and cost effective alternative to face-to-face meetings, but they can also be frustrating and unfulfilling if not conducted well. As in face-to-face meetings, a skilled meeting leader/facilitator can be the key to time well spent on a teleconference. Some unique points of etiquette related to the technology are also important to keep in mind.

Role of Call Leader

1. Send agenda ahead of time, if possible
2. Arrive to the call on time or early to greet callers
3. Call the meeting to order
4. Call for introductions of participants
5. Clarify purpose of call upfront
6. Establish a process (order of topics) or review agenda
7. Clarify duration of call and any rules that may be important (like using the mute button)
8. Ask participants to identify themselves before they speak, at least at the start.
9. Manage the dialog
 - a. Allow time for participants to enter in; prompt if needed
 - b. Use specific questions directed at all participants
 - c. Query individuals for participation as appropriate (like: “Sue, do you think that would work?”)
 - d. Ask prompting questions if a statement “plops” (like: “Does anyone want to react to Joe’s idea?”)
 - e. Keep things moving (“Are we ready to move on?”)
10. Keep track of time and note to the group as necessary
11. Summarize conclusions and commitments at the end of the call
12. Make sure participants know that the meeting is formally over

Role of ALL Call Participants:

1. Make sure you are in a quiet location
2. Use appropriate equipment
 - a. A phone with a handset that is hard-wired into the phone is best
 - b. Cellular or cordless phones often cause static or other distracting noise that gets picked up on the airwaves.
 - c. Speakerphones pick up lots of background noise, and sometimes cause “clipping” because of the limitations of the equipment. A speakerphone that is “full digital duplex” allows all parties to speak at the same time with no “clipping.”
 - d. Use the Mute button on the phone to prevent background noise from disrupting the teleconference. Simply release the Mute button when you want to speak.
 - e. Be careful about putting your phone on hold. If your phone system plays music when on hold the phone call will be toast!
 - f. Turn off call waiting. The beeping that occurs when a caller is coming in to your line can be very confusing and disrupting to the meeting. Most call-waiting features can be deactivated by dialing 70# before dialing.
3. Identify yourself when you join the call, and if you leave the call early.
4. Identify yourself before you speak, each time you speak, at least early on in the call. (“This is John Doe, ...”)
5. Know and keep track of who else is on the call, and when they join or leave the call.

Special Notes / Tips:

1. Combination (hybrid) meetings/calls (where several participants are in a single location and others are calling in) are more complicated than either meetings or conference calls.
2. Visualization techniques can aid the Call Leader and all participants. One example is using name tents listing each call participants and their location.
3. A travel alarm-clock placed in view can help keep track of time, as can setting the alarm.

Addressing Difficult Situations

Situation	Caution	Recommended Approach
One or two individuals dominate	Don't say the person's name and confront them about how they are dominating. Focusing on the dominant person merely gives them more attention, plus you risk offending and then losing their participation.	<ul style="list-style-type: none"> • Focus your attention on the full group and invite participation by others, with a statement like: "I'd like to hear from some folks who haven't talked for a while" • Tactfully interject to help summarize or paraphrase to help the person conclude • Set ground rules that state the desire for tight/short contributions and broad participation and then refer to them when needed
Person is getting off track	This is one of the biggest causes of frustration in meetings. A published agenda and focus questions are your best defense.	<ul style="list-style-type: none"> • Respectfully stop the person and check the relevance of his/her statement to the topic at hand. Suggest holding the comment until the appropriate topic or put in the Bin.
Person is going into an inappropriate level of detail	Fellow members will discredit and lose attention with those going into too much unnecessary detail. Allowing it to go on devalues the person speaking as well as the rest of the members.	Respectfully stop the person and question the need for the amount of detail being offered and ask the group if your perception is right. It may not be. If validated, ask the person to "hit the highlights" and continue.
Side conversation among participants	Don't avoid this situation with the hope it will end; it may end up getting worse.	The best way to address this situation is in advance with ground rules. This allows you to reference the agreed-upon rule if the situation arises. If this is a result of people discussing a process because they are confused, re-explain the process. If a person is having trouble hearing and needs items repeated, make sure the full group speaks loudly and clearly.

Situation	Caution	Recommended Approach
Inadequate completion and follow-through on assignments from meetings	It doesn't help to address this through a weak "pep-talk" or by ignoring it completely. The few that do their assignments may feel taken advantage of.	Keep a clear and visible task list with names, tasks assigned and due dates visible throughout the meeting and available in the meeting minutes. Identify a date midway through the assignment for a progress check – if someone cannot complete the assignment on time, it can be addressed. Encourage work in teams to complete assignments.
Conflicts between two meeting participants	Don't waste time trying to resolve the conflict; they may have no intention of reaching agreement and could be just using the meeting as a forum for arguing.	<ul style="list-style-type: none"> • Reach out to the rest of the group and ask, <i>"Does anyone else have an opinion on this?"</i> • Address the conflict directly recognizing the opposite viewpoints that both may have merit. Suggest that the two won't likely change each other's minds at this meeting and that it is time to move on.
Meeting does not start and/or end on time	Waiting for people to arrive diminishes the value of the people that arrived on time. Going past the stated end time without acknowledging what you are doing puts people on the spot that have other time commitments.	Address this situation right away. Begin the meeting when you say it will begin (not doing so will encourage people to be late for future meetings). If you find the need to go later, discuss this with the group to see if they can. Allow a brief break for participants to make calls or arrangements that allow them to stay longer. If you find that you frequently need more time for meetings, you may need to limit agenda items and meet more frequently.
Meetings consistently last too long	A common problem is for the meeting leader to list topics on an agenda but to not check on how long each topic might take to cover.	<ul style="list-style-type: none"> ▪ Have the topic leaders estimate the time for their topic ahead of time and then put only the topics on the agenda that you have time for. Keep an "if there is time" list as a back-up. ▪ Set time limits for reports if necessary. ▪ Keep track of time at the meeting and check for need to wrap-up or defer as the allotted time nears.

Situation	Caution	Recommended Approach
Goofing around and not paying attention	Avoid chastising participants for not being serious. This can work, though, when it isn't a serious issue and is handled in a light-hearted way.	<ul style="list-style-type: none"> • Allow adequate time for socializing before/after and at breaks • Suggest an unscheduled break if it looks like folks need one • Refocus on the focus question
Lack of buy-in, or resistance to a decision	When decisions are made without true buy-in, they are often not followed or are sabotaged later.	<ul style="list-style-type: none"> ▪ Don't rush discussions when important decisions are being made ▪ If you sense resistance, check it out before closing the dialogue. ▪ Ask for the comfort level with a decision before it is final ▪ If the resistance is strong and cannot be dealt with adequately, defer the decision

NOTES

Books and References

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