

Module 9

Meeting Planning and Management



Introduction

Three objectives of this session:

1. To create an awareness concerning the needs, motivations, and functions of individuals in groups.
2. To develop a clarification and understanding of leadership skills and techniques.
3. To provide an objective basis for using these skills and techniques in a satisfying style of leadership for you and for the other members of the groups to which you belong.

Meeting Planning for Participation

- The Analogy of a Trip -

Most group needs and problems should be the responsibility of the entire membership rather than of its elected leaders only. The elected leaders should coordinate and guide members as they seek solutions for their problems.

These materials are designed to assist community leaders with meeting planning and management to achieve strategic objectives of formal or informal groups. They have been developed with informality and flexibility foremost in mind. Public officials and special-interest groups must provide the opportunity for the development of capable and informed leadership. Our development of leadership may depart from its usual focus as we believe the members must take an aggressive role in-group leadership if the group is to be successful.

Most group needs and problems should be the responsibility of the entire membership rather than of its elected leaders only. The elected leaders should coordinate and guide members as they seek solutions for their problems. This requires not a trained but an educated leadership-membership. Animals are trained; people are educated. Training is a means to an end — education. Thus, these materials are aimed at education.

Although the origin of the following illustration has been lost through numerous adaptations written to fit specific problems, it summarizes the important relationship of each member to the group.

The Effective Use of Time for Meetings

Start on Time

End on Time

Run on Time

Honesty is the Best Policy



Starting on Time, Ending on Time

All the planning involved in program and meeting management can be spoiled if the meeting is not run properly. You may have the room set up, the speakers briefed, and the projectors in place, and then find that the person running the meeting would like to wait ten or fifteen minutes in case more people arrive. Each person establishes his or her own reputation for starting on time. Once people get used to your habits, they will act accordingly. If you call a meeting for 7:30 but really plan to start at 8:00, the people won't show up until 8:15 because they know you won't start on time. If, however, they know by your past performance that you mean 7:30, they'll be there on time.

How many people don't come because they know you are running the meeting; that it will not start on time, will not run on time, and will not end on time?

What are some tips for starting on time? If the meeting is called for 9:30 a.m., serve coffee from 9:00 to 9:30 a.m. Let people know that coffee is available for those who arrive before 9:30. They'll be there and you won't need another break before lunch. Before a sit-down dinner, have a fellowship hour. Serve the first course during this time. This procedure has several effects. First, it does get people there on time.

Second, it gives people a chance to visit. (Remember, after they are seated they will have only five people within talking range.) Third, it gets the first course over with little effort. And fourth, it provides time for other activities such as registration or ticket sales.

Running on Time

Just as important as starting on time is running on time. How? Have an agenda. Let people know the time schedule. Build in extra time in case of problems and then stick to the schedule. Often the meeting manager doesn't want to be committed to a schedule, because he feels there is more flexibility without one. However, there must be some commitment to the audience. After all, you're working for them.

Even with an agenda, it's often hard to keep speakers within their allotted time. One way to help this situation is to tell the audience, when introducing the speaker, how long he or she is to speak. Then end the introduction with the hope that the speaker will try to cut it short because the audience may have questions. In doing this you have reminded the speaker of his or her allotted time; and you have told the audience. It is difficult for a speaker to resist this public reminder. However, you may occasionally have to stop a speaker who is running overtime. Once again, you are working for the audience and not for the speaker, no matter how important he or she may be.

Committee reports should also be kept within time limits. If 10 committees have to report, it is simple arithmetic to realize if each takes ten minutes, you will have an hour and 40 minutes of reports. If you don't really have the time for this, have the reports mimeographed. If reports are to be given during the meeting, announce the ground rules and appoint a timekeeper. Each reporter will have equal time, and no one will feel he or she was treated unfairly.



Arithmetic also comes to play at meetings of public officials such as planning commission hearings or supervisor's meetings where the public is invited. Ask how many people want to be heard. Then ask how long the discussion should last so that people can get home at a good hour. If 30 people want to speak, and there are only two hours to hear them, obviously each may have only four minutes. Once time limits are determined, each speaker knows the ground rules and should be willing to stick to the allotted time. Perhaps small group discussion can facilitate everyone having his or her "two-cents worth" when time is limited. Or several people with the same viewpoint will join under one spokesperson so that a better presentation can be made. This helps both the public and the officials who are holding the hearing.

Honesty is the Best Policy

Another important part of running a meeting is being honest with the audience. If something goes wrong, admit it and continue. If a speaker is late, tell the audience, and then give them a choice of alternatives. "Our next speaker just phoned from the airport to say he is on his way. We all know it takes 20 minutes to get here. Now we can take a 20-minute break, we can go back to the discussion we had to cut short this morning, or, since the next speaker is here and prepared to go on, we can jump ahead without hurting the program. You realize that with the first two alternatives, we will be 20 minutes late ending the meeting. What is your pleasure?" Given these choices, the audience will decide, and right or wrong, it's their choice. Be sure to give the audience alternatives, or chaos will result from a "What do we do now?" type question.

While there are many difficult situations in running a meeting, most of the routine problems can be solved. If two people insist on carrying on a private conversation during a presentation, you may have to act like a grade school teacher and ask them to stop or continue outside. This may sound drastic, but after the meeting people will come up to you and thank you for your action. After all, the conversationalists were disturbing everyone.

What about the person who monopolizes discussion? You may have to establish some system of recognizing speakers, or put the talkative person on a study committee for recommendations. You may have to ask someone bluntly to let others speak. Sometimes when this is done the rest of the audience cheers. You have done what they wanted to do.

Of course, meetings should also end on time. People may have driven from a distance and have over an hour's drive to go home. You owe these people the opportunity to leave at the announced time. So stop the meeting, even if you have to interrupt the speaker, and announce, "I promised you the meeting would end at 10:30. Some of you came from quite a distance. If you feel you would like to leave, get up, get your coats, and go. Those who would like to stay to hear the rest of this interesting talk are welcome." Or, if it is during an interesting question or discussion period, you might state that the speaker will stay a few minutes after the meeting for those



who have more questions. Remember these two points: when you stop a meeting during a good discussion, people will want to come back another time, and no one ever complained because a meeting ended early.

Who Makes the Group a Success?

A group may be likened to my typewriter. It is an old model, but it works quit well except for one of the keys. Many times, I have wished that it worked perfectly. It is true that there are forty-six keys that function well enough, but just one key not working makes the difference.

Sometimes it seems to me that my groups are somewhat like my typewriter — not all the key people are working together.

You may say to yourself, “Well, I am only a member — one person. I won’t make or break the group.” But it does make a difference because a group to be effective, needs the active participation of every person.

So the next time you think you are only one person — a member — and that your efforts are not needed, remember my typewriter and say to yourself, “I am a key person in the group, and for it to function effectively, I am needed very much.”

The Regular Meeting

In this section we will look specifically at regular meetings — the usual type of meeting scheduled for regular intervals. All members have a part in this type meeting. Purposes of regular meetings usually include transacting business, presenting information directly or through discussion and providing recreation or entertainment.

People involved in regular meetings may be categorized according to their jobs: program planners, meeting managers, program performers or other participants.

Sometimes in smaller meetings, all functions are performed by the same group. Everyone should participate in evaluating the effectiveness of the meeting.

Program planners take the lead in pre-meeting planning and again during follow-up. Program planners may include officers and committee members, program committee, and social committee.

Meeting managers are responsible for the meeting site, equipment necessary for smooth presentations, and other arrangements such as meals, tours, and publicity. In addition to officers and committee members, others may be called upon to assist with special skills.

Program performers are “out front” at the meeting itself. They include all the people who are assigned to special jobs such as giving reports, speaking, leading games, or other activities that keep the meeting going.

Participants, like program performers, take an active part in a successful meeting. Participants play many roles during the meeting including planning a program or



Table 1. Types of Meetings

TYPE	HOW LARGE?	HOW OFTEN?
Regular Meeting	All members, often 25-100	Regularly, monthly, weekly
Board of Directors of Executive Committee Meeting	Usually small, 5-15	Monthly or quarterly
Special or Standing Committee Meeting	Small group, 3-9	Variable — may or may not have regular time
Special meeting	Any number	Only once

event, performing in a skit, setting up the room and equipment, evaluating the business meeting, and the recreational, social and educational programs.

Groups must work together, and often the same person performs two or more jobs to insure coordination between the program and arrangements committees.

Planning Before the Meeting:

- Plan the Program
- Know Your Group
- What is the Purpose of the Meeting?
- How to Handle the meeting
- Build your agenda.
- Plan for business and education.
- Plan for celebration and recreation.

Three Guidelines for Direction

Three guidelines help improve meetings: plan before the meeting; meet to carry out plans; and follow up after the meeting. Let's see how these guidelines help make a meeting successful.

Three Guidelines for Meeting Direction

Plan before the meeting
Meet to carry out plans
Follow up after the meeting



Planning Before the Meeting

Plan the Program

Planning is one of the important steps toward better meetings. During planning, the program planners take the lead. Those who will be program performers at the meeting also have to plan what they will do. And all the participants are in the picture, too.

Know Your Group

So you're on the program committee. What do you do?

First, get your bearings. Read your bylaws. Ask outgoing officers, committee members and group members for suggestions about things that have been successful in the past. If information is kept in a folder and passed on, it will save many false starts. It is time well spent when a new program committee thinks through questions such as: What are the long-range objectives of our group? What makes a good program? How does a good program differ from a poor one? How can each member of this committee help build a program? Who knows the library well? Who has time to telephone? What else can we do?

Now, start planning for the year's activities and in turn for each meeting. In planning each meeting, ask these basic questions: What is the purpose of the meeting? How should the meeting be handled? What specific plans must be made for business, education, and recreation? Who should do what?

What is the Purpose of the Meeting?

Long-range group objectives must be broken down into goals for the year. Some annual goals may be related directly to long-range objectives. Others may be indirectly related, but still important. For instance, if you need more money for a clubhouse, you may find that first you must build up membership.

The year's goals, in turn, must be made "bite size," with plans for each meeting. Remember to include those things that help keep the group together along with activities chosen by the group.

Time at a regular meeting is limited. Use it for activities that cannot be done well in other ways. Use the regular meeting for transacting business already thrashed out in committee meetings. A regular meeting also is needed if all members will benefit from participation.

Remember, though, that not everything has to be done in regular meetings. Some goals may require hours of committee meetings, but only minutes in a regular meeting.

Don't clutter regular meeting time with things that can be done just as well outside.

How to Handle the Meeting

Build your agenda. Before a meeting you need an agenda. Usually the president or chair prepares the agenda, since he or she will preside. But days before the meeting the chair should check with officers, committee chairs and members who may have items of business to bring up. An outline guide is helpful in drawing up your agenda.



The agenda should indicate time available for major items — especially if you think they may drag. Many groups find a good balance of meeting time to be about one-quarter each on business, presentation of a topic, discussion, and recreation. But each meeting will vary. Sometimes the whole meeting is for fun.

Note the built-in cushions. Too often the agenda is so jammed that very little time is available for discussion and questions. If the keynote speaker or the windup speaker runs over by five or 10 minutes, no great harm is done, but there is less time for questions. Note also that time is allotted for housekeeping details, such as going from one workshop to another picking up materials and getting ready for lunch.

It is not necessary to start with business every time. The educational part of the program can be first. Recreation can be first or mixed in throughout the program.

Flexibility, not rigidity, should be the key work in preparing an agenda. Finally, announce this agenda, including items to be considered, order of consideration, and time available for each item, to the group.

Plan for business. Plan the business part of the meeting to check on group progress and to set policy. Out-of-meeting activities are also reported in the business portion of the regular meeting.

A smooth business meeting evolves from two instruments of planning: agendas and committees.

Committees meet between regular meetings to make minor decisions. They also study and make recommendations for major decisions, to keep time-consuming details from cluttering the business meeting.

Plan for education. Within the broad goals for the year, planners must choose topics for each meeting (perhaps following a theme for the year). Then they must consider ways to handle topics.

You'll find many sources of meeting topics: (1) What topics are suggested by the group's objectives? (2) What are members interested in? Part of a meeting may be devoted to "brain-storming," a time when everybody throws in any idea, however farfetched. Or short questionnaires might be sent to members for program suggestions. (3) What have been the programs in recent years? Should you dig deeper into some topic or consider something new? (4) What is of current importance?

Exchange program ideas with people from other organizations. Watch the newspapers for ideas. (5) What ideas are suggested by outside "resource people?" Their training and experience are resources to you; use them!

There is no one "right" way to handle topics. Choose a variety of ways to suit different occasions. Research shows that people learn little by hearing someone speak.

They learn most by hearing, seeing and talking about the subject themselves. So plan to illustrate what is said. There are many visual aids to choose from — pictures, blackboards, live animals. Plan also to give everybody a chance to take part in discussion, as well as to hear and see.



Sample Agenda

All Day Conference or Meeting

Location

9:00	Coffee and juice for early arrivals
9:15	Welcome from convenor <ul style="list-style-type: none">• Explain reason for meeting• Provide instructions for workshops
9:30	Speakers or panels
10:10	Question and discussion period
10:20	Break
10:30	Breakout sessions: <ul style="list-style-type: none">• Form small groups to discuss plans 11:00
	Reports from small groups (3 minutes each)
11:50	Break
12:00	Lunch
1:00	Workshops in Rooms A, B, C
2:30	Break: Coffee and juice in vicinity of meeting
2:50	Concluding speaker
3:30	Questions and discussion
3:45	News release or announcements
4:00	Adjourn

Plan for celebration and recreation. Recreation, like business and education, can serve the group's long-term objectives. Plan for activities that build group spirit while serving members' individual interests. Poorly planned entertainment may drive members away.

You may want to have celebration and recreation at several different points in the program:

- A mixer as the group assembles.
- A stretcher — a welcome break when everybody has been sitting for a long program.
- A recreation feature — the main part of the recreation program.
- A closer to “sign off” — something to pull the group together.

Since the needs of each group differ, you must consider these needs when planning recreational activities. Make a special effort to: (1) Plan for the group. Have something that interests different members. Use local talent when appropriate. (2) Plan for the occasion. Recreation may carry out the theme of the meeting. (3) Plan for variety. Draw up a calendar of varied recreational activities for meetings. (4) Plan for a feeling of participation by all.



Plan with the Performers

The planner's role involves spelling out jobs and helping people understand and prepare for these jobs. Here are just a few of the jobs to be assigned: presenting a topic; arranging for a meeting place; getting props (projector, easel, chalk); and handling publicity before and after the meeting. Distribute jobs among members, not just among the planners. This keeps people interested and is easier in the long run.

Let's take a closer look at how program planners work with performers, then discuss the role of other members in planning for the meeting.

Orient your speaker. Suppose you have chosen a meeting topic and have invited a speaker who knows the subject and can present it well. You can make the meeting more productive if you help the speaker plan and put him or her at ease.

Know your speakers. Ask the speaker for personal information to be used in publicity and introductions. This information should include the speaker's name and position, experience that qualifies him or her to speak on this subject, and title of the talk.

Reach a clear understanding on financial arrangements. Will your group pay the speaker or meet travel expenses? If so, how much?

Plan with the Performers

- The planner's role involves spelling out jobs and helping people understand and prepare for these jobs.
- Distribute jobs among members, not just among the planners. This keeps people interested and is easier in the long run.

Orient your speaker. Know your speakers. Draw in all members.

Speakers often complain because they lack facts about a forthcoming meeting. Audiences complain because a speaker didn't know who he or she was talking to and was too elementary. Speakers need information to do their best at your meeting. Only you or someone close to your group can tell them about your group's broad objectives, the purpose of the meeting, the audience, the anticipated program, and the facilities available. These are things you would like to know if you were the speaker. Describing the audience — their knowledge, skills, and attitudes — helps the speaker avoid stereotyping the group. For example, if you tell the speaker only that the audience is a group of farmers, he or she may think, "they'll all be wearing bib overalls, smelling of manure, chewing on straws, with few of them educated beyond the sixth grade." You owe your group more than this sort of treatment.

You should also tell the speaker the subject you would like him or her to speak about. If you say, "Come tell us what you think we want to hear," the speaker will give you talk "32b," and no one will go home any wiser. You cannot expect to learn anything new unless you challenge the speaker to give it to you. In addition, let the speaker know what facilities are available. If the talk depends on slides or other projected visuals, and the room cannot be darkened, the speaker should know it ahead of time.



The Information Sheet for Speakers will assist you with this part of your meeting management responsibility. Fill out this sheet for each speaker and send it well in advance of the meeting. Notice the three divisions — audience, program and facilities for sight and sound. Fill out the audience portion with relevant information. For example, under topic relevant subgroups, list only those that might have a bearing on the conduct of the meeting. If there is a faction within the expected audience which will probably react negatively to the speaker of the topic, the speaker should know this. Under problems and interests, list only those that deal with the topic with which the speaker is concerned.

Draw in all members. Create interest before the meeting. As you ask members for program ideas, you are also helping them see this as their meeting, and not just the program committees.

Let members know at a previous meeting: major items of business, topics and how they will be handled, what's planned for fun and fellowship, and what members are expected to do — sort of a pre-agenda to build interest.

Some meetings should be publicized widely, especially if they are for the general public. In addition to newspaper announcements and radio spots, you may need posters and announcements at meetings of other organizations.

Use Resource People

How can you make the best use of a resource person who is not a member of your organization? Usually we invite a professional person to come and speak. This may be interesting and informative but often is not the most effective way to use such a person.

In many cases it is more effective for a resource person to sit in as a group discusses. He or she can make comments when asked, suggest ideas and perhaps summarize. These comments will be to the point, because the resource person sees the trend of the group's thinking.

Another effective device is to have a resource person participate with the program planners. Your meetings will be richer because of this special competence and shared ideas.

Plan the Meeting Management

Meeting management, a relatively new term, is the art of planning and running meetings. This guide was prepared to assist the meeting manager, the person who has agreed to gather facts from the program chairman and others, plan all arrangements, and see that they are carried out. (Others should have already asked such questions as "Should there be a meeting?" or "Can this job be done better another way?")

Meeting Management — A Function of Leadership

Nowhere are leadership attributes more tested than in planning and running meetings. You must organize effectively, make decisions, listen to others, delegate responsibility and see that plans are carried out. This is a visible job. If you blow it, people know it, and they know who is responsible.



Check Your Meeting Plans

Make your own list of the main things that must be planned. Write down names of persons responsible, and check off when each job is completed. Double check a couple of days before the meeting to make sure nothing has been neglected. Try this check list as a guide.

Organization for Meeting Management

An effective meeting manager simplifies the job by putting someone in charge of each major responsibility. This procedure uses others' talents and gets more people (who will ultimately attend the meeting) involved. The following sample organization plan can be simplified or expanded, depending on the particular meeting:

It may not be necessary for the meeting manager to appoint someone to be in charge of each function. The committee chair or sub-committee chair should be given this job. For small meetings one person may take charge of all tasks including those of program and budget chair.

The Meeting Manager's Checklist

The following checklist can be used when planning large meetings, or adapted for smaller meetings by omitting items not relevant to the particular meeting. Start by gathering the facts. This includes considering major questions such as: How many people are coming? Do you want publicity and thinking of minor matters: Will a coffee break help?

Once all the facts are known, the planning can begin. In front of each item are two boxes labeled NEED TO DO and DONE. A checklist may be used for each meeting, or if the group plans to meet for more than one day, a new list can be used each day.

After examining items on the check list, assign tasks to the committee chair in charge of that section. Be sure to go over each chair's section with him or her so that he or she will know what is expected. Chairs may suggest other items to check.

Make sure you each have a copy of the chair's portion of the checklist.

After this, see that each chair follows through. Do not nag!! Treat each person with respect and assume he or she can do the job. After all, you selected this person. Set a regular time for reports so that each chair will know when he or she is expected to have certain jobs completed. As each report comes in, check that item in the DONE column.

Tips Regarding Meeting Arrangements

Meeting place. This is the most important part of meeting management. Your choice may be limited to available community facilities. Or you may have an entire county, region, or state to meet in. Since the availability of adequate facilities will strongly influence which site is chosen, consider the facilities when choosing a site.

Meals and breaks. Whether the group is eating together at a luncheon or banquet, or just going to the same diner, plans should be made.



Housing. Hotels or motels can usually take care of housing details. However, if the group is to use private homes, extra planning is needed.

Registration, materials and printed matter. Registration is important if there are meals, rooms, special events, memberships, and other reasons to know who is there. Registration is good way to greet people and make them feel welcome. It may also be the only chance to see that all pay any fees connected with the meeting.

Promotion, publicity and public relations. Assume that people do care about your meeting. Find out from the local newspaper editor how to submit news items. Some newspaper editors may prefer to gather their own news, as may radio and television news directors, who may want a tape, written item, interview, or telephone call. It is good public relations to get to know these people personally and to let them know who you are and what your group does. Consider also the use of photography. Find out if the media people want pre-meeting news, post-meeting news or both. Should a press room be set up? Is there reason for a press conference? Learn what makes good news copy and include in the meeting newsworthy items such as well-known speakers, awards, and other recognitions.

Tours. Nothing can get so fouled up as a tour without pre-planning. If anything can go wrong, it will, because you have to rely on many unpredictably factors such as traffic, crowded restaurants, and people's need to stretch and explore. Allow extra time and tell people in advance where you will stop.

Entertainment. This may be a "home-grown" program, a simple film or group singing. If it is professional, remember to treat the performers as artists, not hired hands. You will probably get a better performance.

Exhibits. The person responsible for the exhibit should be aware of potential difficulties. There may be many regulations, from "don't use cellophane tape on the wall" to complicated electrical and fire ordinances. Find out if draperies and furniture will be supplied by a particular contractor. Tell exhibitors ahead of time what they are expected to bring and what will be furnished.

Room Set-Up

The value of planning is evident in a well-run meeting. An area that deserves extra discussion is room set-up. Room set-up includes not only the elements to be set up but the positioning of these elements within the room. It also includes seeing that everything works and checking out details in advance. For example, there might be an excellent public address or audiovisual system in the room, but only the house manager is allowed to operate it and he or she will not be available the day of the meeting. Make no assumptions.

Start from Scratch

When first entering the meeting room, look at it as so many square feet of space. Decide which direction the audience should face. Don't be misled by the way the room is already set up. (Of course, your choice may be limited by a stage or a projection booth.) Where are electrical outlets? Switches? Extra bulbs? Circuit breaker?



Meeting Manager's Check List

- A. Business (Whose Job? Done?)
 - _____ 1. Prepare officers' and committees' reports.
 - _____ 2. Mimeograph and mail out reports.
 - _____ 3. Send members notice of important items for forthcoming discussion.
- B. Education
 - _____ 1. Choose topic (related to year's program).
 - _____ 2. Consider best way to handle topic (panel, film, speaker).
 - _____ 3. Plan with persons on program.
 - _____ 4. Prepare to introduce program.
 - _____ 5. Decide on visual aids; preview films or slides.
 - _____ 6. Plan for audience participation.
- C. Recreation
 - _____ 1. Plan recreation to suit varied interests of members.
 - _____ 2. Designate persons to lead recreation.
- D. General
 - _____ 1. Draw up agenda.
 - _____ 2. Send invitations.
 - _____ 3. Post greeters at a door.
 - _____ 4. Play host to special persons arriving.
 - _____ 5. Assign follow-up jobs: thank you(s), return props.
 - _____ 6. Prepare announcement of meeting to follow.

The plugs for microphones and other audio devices? Draw a diagram showing these important locations, since it is easy to forget them afterward. Where are the windows? Can they be darkened? Make sure neither audience nor speakers have to face uncovered windows. Help the speakers keep good eye contact with the audience by arranging the audience inside a 90 percent viewing angle.

Determine how many people the room will hold. For a typical meeting with visual aids the formula is:

$$\text{Number of people} = \text{Usable length} \times \text{Usable width}$$

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Notice the term "usable." No one should sit farther away from the screen than six times its width. Therefore, if the screen size is 6 feet, the last row should be no more than 36 feet away. Conversely, if the room length is 60 feet, there should be a 10-foot-wide screen. In addition, no one should sit closer than two times the width of the screen. Any aisles or walkways should be subtracted from the usable space. So



in a room that is 30 feet by 40 feet with a 6-foot screen, the following calculations will determine the number of people that room can hold:

40' (length of room) - 12' (2 x screen width) - 4' (aisle at back) multiplied by 30' (width of room) - 12' (aisles at side and center) divided by 6 (number of square feet needed per person)

$$\frac{24' \times 18'}{6} = 72$$

6

No one in an audience watching projected visuals should be seated farther than 30N off the perpendicular of the screen.

In the above diagram it would be better, if possible, to place the screen at the short dimension of the room rather than the long. If the room is to be set up for a workshop, divide the number of people in half because you'll want tables and they take up space.

Once you have decided how the room is to be used, indicate on your diagram where you will place the essentials, i.e., chairs, tables, audio-visual equipment, speaker's tables, and other items listed in the checklist. Place visual display devices as high as possible so they can be seen from the back row. Screens should be hung from the ceiling, or in the case of portable screens, raised as high as possible. To test for visibility, have a friend sit in front of you and note how far down on a screen or easel pad you can see above the friend's head (see diagram). A stage or platform adds to the visible area. Note the diagram of an ideal meeting room and try to meet the essential requirements if possible from the standpoint of facilities for sight, sound, and comfort.

Further Considerations for Meeting Planning and Management

- Use Resource People
- Plan the Meeting Management
- Engage in Meeting Management: (A Function of Leadership)
- Check Your Meeting Plans
- Organization for Meeting Management

Essentials

These items are essential for meetings with a professional touch:

- Electrical outlets conveniently placed on several circuits
- Adequate house lights plus spot lights for display room
- Light switches where they will be used, such as in the room entrance, stage, or projection area
- Remote controls for projectors
- PA system with at least 4 microphones and 2 phone inputs, with permanent link to projection area for sound projectors; microphone and phono inputs where they will be used.
- Complete heat and air conditioning controls
- Blackout shades for windows
- Large enough screen for room (1/6 room length)



- Other display devices at hand: Projectors, easels
- Raised area for speaker and visual display devices
- Restrooms, parking, chairs, tables

Frills

These items are helpful but not absolutely necessary:

- Dimmer switches for lights
- Projection booth
- Outlets for telephone and television
- Kitchen, coat rooms, and storage areas
- Flags, pianos and other amenities
- Dressing rooms
- Stage lighting and curtains
- Room dividers

Be a Talent Scout

Who should run meetings? We often pick the person for the wrong reasons. Some people are unable to run meetings properly. Some groups assume that the president of the organization should run all the meetings. Others have a program chair or a lecturer perform this task. Still others pick the person for political or publicity reasons. Any one of these reasons is valid, provided the person can run the meeting. Many presidents who realize their shortcomings simply open the meeting and after the business session turn it over to the meeting manager or someone else qualified to run the meeting.

A qualified person will, when the speaker asks, “How much more time do I have?” answer “Five minutes” rather than “Oh, take all you want.” This person is flexible to take problems and turn them into opportunities, honest enough to let the audience know it is their meeting, and courageous enough to be both flexible and firm.

Members Participate

A major key to success in meetings is getting wholehearted member participation. Participation is equally necessary for a democratic business meeting, for meaningful education, and for satisfying recreation.

Not all members will be equally talkative. There is no reason they should be, but all must have equal opportunity to talk and to take part in others ways. To encourage members to participate, program performers must do two things. First, they should create an informal atmosphere. People must know that they are permitted to say what they think, no matter how different it may be from others’ ideas. Secondly, performers should ask questions of the audience. Create an expectation of an interesting meeting.

Business

The chair follows the list of agenda items, including a time for unanticipated questions.

Part of the business meeting calls for decisions to be made. Some sort of traffic rules must be clearly understood in making decisions. Many groups use some form of parliamentary procedure, such as Roberts’ Rules of Order or a modification of them.

Others use different traffic rules, such as getting consensus on decisions but not voting.



In general, the larger the group or the hotter the issue, the more important it becomes to follow a carefully planned procedure in making decisions.

Use rules to get things done, not to “gum up the works.” The trend today is to make parliamentary procedure more flexible. Some groups are finding that it helps to discuss a question informally and come to general agreement, or at least come to an understanding of the problem before a formal motion is made. In such cases a motion can be disposed of quickly.

Education

The educational feature puts the program performers up front. People in supporting roles are ready to see that the program is successful. Those on the program should do four things: Prepare the audience, present information, encourage members to participate, and summarize.

Prepare the audience. State clearly the purpose of the program and the procedure. If special persons are on the program, introduce them in an interesting way. This is usually done by a program committee member.

Present information. New facts or insights must be made clear and interesting. Watch to see that information is understood by the whole group. Tactfully indicate the time limit to a speaker by announcing it to the whole group. This helps keep the program on schedule.

Encourage member participation. Participation will be easier if you have planned an appropriate method for handling the topic. Someone must be responsible for leading the discussion and keeping it on the track. During the question and answer portion of the meeting, ensure that questions are really questions, not speeches. Announced agendas, together with time limits, help here.

Summarize. Give a summary of major points from the discussion as well as the presentation. If any follow-up is called for, make clear what is to be done and get people to commit themselves to act.

Encourage Everyone to Take Part

Stop each activity while the group is still interested. Don't let them get tired of it.

Remember, a good closing is just as important as a good beginning.

Stand by for Emergencies

Program planners are in the background but alert during the meeting. At least one program planner should: (1) Watch the meeting and see that it is going smoothly. Check whether all can see and hear. (2) Adjust the program as needed. Shorten or lengthen items, or call for a break if necessary. (3) Be ready for emergencies. If plans fall through, step in with something else.



Follow-up

Here is the last guideline to ensure better meetings. After the meeting the program planners should ask for help from those who performed and all who participated.

Pick Up the Pieces

Planners should see that several things are taken care of immediately after the meeting: (1) Express “thank you(s)” to those who had major responsibility. (2) Return props and equipment in good order. (3) Publicize timely and interesting items in ways to reach the right people.

How Did it Go?

A major job of program planners is to look back at the meeting and ask, “How did it go? How could it have been better?”

There are a number of ways to evaluate a meeting. Keep your eyes and ears open for comments at the meeting and discuss them at a program committee meeting after-ward. Pass out a simple check sheet at the meeting, asking members to write their frank opinions. (See the sample check sheet.)

At the end of the meeting, briefly discuss how it went and get suggestions for improvement. This might be done in small groups, with each small group reporting to the entire group. Designate one or more persons as “silent observers” of the meeting. Toward the end of the meeting, let them “feedback” what they have observed. The emphasis of such observations is on how, not what the group discusses. As the observers report, the whole group can join in to analyze the way the meeting has developed. Program planners can use a checklist to evaluate the meeting after gathering reactions in other ways.



Checklist for Meeting Evaluation

Subject	Check One			Comments
	Good	Medium	Poor	
A. Business				
1. Were details worked out in advance, so they could be handled smoothly?				
2. Were “traffic rules” used effectively to expedite business?				
3. Was discussion clear and to the point?				
4. How well did members take part in discussion?				
5. Was minority opinion given a fair hearing?				
6. Was it clear who should carry out decisions?				
B. Education				
1. Was the topic interesting and clearly presented?				
2. Were audio-visual aids used effectively, or did they detract?				
3. Did all have an opportunity to participate in discussion?				
4. How well did discussion get at important issues?				
5. Was a follow-up required? If so, was someone given responsibility?				
C. Recreation				
1. Did the recreation interest all of the members?				
2. Did all take part?				
3. Did it add to the meeting?				
D. General				
1. Did the meeting start and end on time?				
2. Were arrangements satisfactory?				



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Module 9A

Using Meetings to Develop Consensus: Building Human Capacity Consensus and Team Building

Consensus and Team Building

Successful teamwork is distinguished by a synergistic blending of human resources directed to achieve shared objectives (Harrington-Mackin, 1994:xi).

Every team requires individual commitment to shared goals, acceptance of rules that support common values and beliefs, and communicated dedication to responsible behavior.

Teams develop their own code of conduct. Team leadership determines the content of the code.

**Empowerment happens through teams and teamwork
creates change. Start with vision!!**

Characteristics of an Effective Team

- A sense of commitment.
- A high degree of communication within the group and with people outside the group.
- A healthy degree of disagreement and creativity.
- Agreement through consensus.
- A sense of empowerment.
- A sense of shared trust and respect
(Weiss, 1993:10).

The Role of Teams and the Team Development Process

Teams are the means, not the ends, of an organization's process of achieving goals and changing to meet the needs of its constituents (Harshman and Phillips, 1996:52). Change starts with the individual and gets its first tryout within the context of a small group of trusted members. The small group can serve as the testing ground and proving ground for significant change. The closer the team is to the firing line, the better and more effective the organization will be to respond quickly and constructively to constituent needs.

Desirable Behaviors for Members

- Learn to speak up in meetings or groups.
- Take responsibility for own thoughts and actions.
- Learn to state an opinion constructively.
- Receive and express positive and negative feelings.
- Say no without harm.
- Respond to criticism constructively.



- Make requests of authorities.
- Negotiate for something desired (Harrington-Mackin, 1994:55).

Desirable Behaviors for Team Leaders

- Be willing to share power and responsibility.
- Propose ideas for discussion.
- Ask appropriate questions.
- Listen to others with respect.
- Remain open-minded.
- Promote an atmosphere of trust (Harrington-Mackin, 1994:56).

Desirable Behaviors for Committee Chairs

- Have the courage to resist recommendations that are not beneficial.
- Accept decentralized decision-making.
- Believe that everyone has good ideas.
- Be willing to implement team suggestions whenever possible.
- Recognize team accomplishments.
- See teams as a long-term effort (Harrington-Mackin, 1994:56).

“Organizations are like elephants – slow to change.”

(Belasco, Teaching the Elephant to Dance. 1990:2)

Team Members’ Rights

- We have the right to support members emotionally while disagreeing with them intellectually.
- We have the right to criticize ideas, but not people.
- We have the right to say what we think, whether others agree or not.
- Conflicts will occur. We have the right to try to learn and grow from them.
- We have the right to expect others to try to overcome avoidance and to deal with conflicts.
- We have the right to expect members to try to participate and to work to become more involved.
- We have the right to expect we are all equal members; no one member’s ideas are any greater than another’s and all will be subject to the same scrutiny.
- We have the right to expect that people will leave their “power” and “position” outside the team.
- We have the right to express our feelings without being told we “should” feel a different way.
- We have the right to expect that the process will take a long time and that periodically we will make mistakes (Harrington-Mackin, 1994:56-57).



Strategies to Discourage

What are you most likely to do?

Twist arms. Pull rank.
Give “I’ll get you later!” look.
Hurl sticks and stones.
Give the cold shoulder. Makes other pull teeth. Create a nonverbal drama. Cheerlead. Interrupt.
Be a naysayer.

Strategies to Encourage

What are you least likely to do?

Accept opposing views.
Clearly communicate.
Listen completely.
Criticize ideas, not people. Accept criticism.
Share your ideas.
Invite everyone to participate. Stay on the subject.
Thank people.
Leave disagreements in the room.

(Harshman and Phillips, 1996:88)

Good Communication:

Is goal-oriented.
Is clear and understandable.
Conveys respect for listener(s). Is open and allows response(s).
Is consistent with and uses emotion.
Avoids “games” and hidden agendas.
Seeks mutual understanding.
Includes “I” statements and ownership.
Avoids assumptions!!
(Harshman and Phillips, 1996:89)

Consensus Includes:

Pooling opinions
Effective listening
Discussing ideas and differences
Not getting all you want
Agreement to the point that everyone “can live with it.”
(Harshman and Phillips, 1996:67)

Consensus Does Not Include:

Voting
Majority rule
Minority rule
One-person rule
Bargaining without acceptance.
(Harshman and Phillips, 1996:67)



How Consensus and Team Building Works

Each Team Member Should:

- Prepare your position.
- Express your position.
- Listen to the opinions and feelings of all other team members.
- Avoid using “win-lose” techniques.
- Alter the solution.
- Take the time you need to listen, consider other views, develop your own perspective, and be reasonable in reaching a group decision.
- Remember that decision by consensus is difficult but worth every effort (Harshman and Phillips, 1996:68).

Helpful Hints to Reach Consensus

- Overcome barriers by stressing the possible, not the impossible.
- Treat each problem as a new one. Solutions that worked before may fail because circumstances are different.
- Encourage creative discontent and channel it toward the issue, not toward other group members. Accept responsibility for hearing and being heard.
- Be sure all participate without allowing any one person to dominate. Silence is not necessarily agreement. Silent members may be an indication the team has not tapped all its resources.
- Encourage and explore differences. Do not force consensus, even under the pressure of time.
- While the consensus process values each and every person involved, do not let a single stubborn person hold the team up forever. Provide constructive alternatives and allow the process to move forward.
- Do not confuse consensus with unanimity.

A unanimous decision is one in which everybody supports everything fully (100% agree 100%).

Consensus is more like everybody supporting 70% of the proposal and being satisfied they can live with it.

(Harshman and Phillips, 1996:69).

Consensus is achieved when every member can say...

“I have had the opportunity to express my views fully, and they have been thoughtfully considered by the group.

Even though this solution may not be the one I believe is optimal, I think it will work and I support it.”

(Harshman and Phillips, 1996:66)



**KEY ISSUES FACING THE GROUP:
HIGH AND LOW CONSENSUS ON ENDS AND MEANS**

	HIGH CONSENSUS	LOW CONSENSUS
ENDS Goals and Objectives to be Achieved		
MEANS Methods to be Used to Achieve Goals and Objectives		



**LOW CONSENSUS ISSUES AND CONCERNS EXAMINE ENDS AND MEANS
WITH POSITIONS AND INTERESTS**

	STATEMENTS MADE, POSITIONS TAKEN AND POSITIONS HELD	THOUGHTS NOT EXPRESSED AND THE INTERESTS BEHIND THE THOUGHTS
ENDS Goals and Objectives to be Achieved		
MEANS Methods to be Used to Achieve Goals and Objectives		



Team Building Boards: A Good Place to Practice Teamwork

Teamwork Elements: Synergy and Trust

- Teamwork results in synergy.
- Trust is a reliance on the integrity and sense of justice displayed by a person or members of a group.
- Synergy is the principle of the whole being greater than the sum of its parts.

Essential Elements of Team Building

- A clear goal or purpose for working together.
- Each member must have something to contribute.
- Each member must perceive some benefit by being in the group.
- A team needs to be accountable as a functioning unit.
- The team must allow itself time to do the job (Buchholz and Roth, 1987).

Teamwork . . .

When this occurs, creativity is enhanced, innovation is sparked, effort is focused, and others marvel at what they enjoy while accomplishing so much.

Primary Advantages of Working in Teams

- Decisions made by teams usually reflect a wider variety of facts and knowledge than do individual decisions.
- Team interaction usually results in more alternatives being considered before decisions are made.
- Recommendations from teams usually have a higher level of accuracy than do individual recommendations.
- Teamwork encourages the widespread ownership of a community problem.
- Team decision-making causes group members to be better informed and more knowledgeable about the decisions reached.
- Team members develop a team spirit.
- One mixed blessing has been said to occur in teamwork (Buchholz and Roth, 1987).

Primary Disadvantages of Working in Teams

- Sometimes teamwork may take more time than can be spent to do the task. Sometimes, group leaders can depend on teams so much that they stop functioning as the leader. They look to the team to make every decision.
- Team decisions can result in compromise decisions that are not always the most useful or beneficial.
- Teams are usually competitive, with a desire to win. The emphasis of the competition must be on winning as a team, not winning at the loss of a team member.



Characteristics of an Effective Work Team

- The atmosphere tends to be informal, comfortable, relaxed.
- There is a lot of discussion in which virtually everyone participates, but it remains pertinent to the task of the group.
- The task or the objective of the group is well understood and accepted by the members.
- The members listen to each other!
- There is disagreement.
- On the other hand, there is no “tyranny of the minority.”
- Most decisions are reached by a kind of consensus in which it is clear that everybody is in general agreement and willing to go along.
- Criticism is frequent, frank and relatively comfortable.
- People are free in expressing their feelings as well as their ideas both on the problem and on the group’s operation (Buchholz and Roth, 1987).

Factors that Promote Good Working Relationships

- Team meeting - with agenda and sufficient time to discuss
- Knowledge of others’ responsibilities
- Criteria for evaluation
- Trust
- Loyalty
- Respect for others in spite of professional differences
- Courtesy
- Respect for professionalism regardless of person’s sex, age, race
- Recognizing talents of the others
- Giving credit
- Recognizing a job well done
- Pride in work of total team
- Understanding and supporting others’ programs
- Agreed upon priorities
- Circulation of pertinent information
- Willingness to talk over problems
- Cooperation
- Sincere caring for others with a respect for privacy
- Constructive criticism (Buchholz and Roth, 1987)

Factors that Hinder Working Relationships

- Lack of understanding of others’ jobs and responsibilities
- Lack of concern about total team efforts
- Disregard for feelings of others
- Unwillingness to compromise
- Poor communication
- Competition among team for individual prestige and recognition
- Negative and destructive criticism



- No involvement in administrative decisions
 - Lack of leadership
 - Over-sensitivity
 - Disregard for talents of others
 - No opportunities for team meetings
 - Gossip, rumors
 - Putting off decision making
 - Lack of trust
 - Lack of common goals and philosophy
 - No evaluation and/or feedback from supervisors
 - Limited understanding of total program
 - Holding a grudge
 - Lack of confidence in fellow workers
 - Prejudice, racism, sexism
- (Buchholz and Roth, 1987)

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