

PART IV



Participation Tools



Chapter 12

Planning and Conducting Meetings

Chapter 13

Making Presentations in Groups

Chapter 14

Technology and Virtual Groups

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Planning and Conducting Meetings

CHAPTER OUTLINE

Meetings, Meetings, Meetings

Planning the Meeting

Why Are We Meeting?

Who Should Attend the Meeting?

When Should We Meet?

Where Should We Meet?

What Materials Do We Need?

Preparing the Agenda

Elements of an Agenda

Determining the Order of Items

Double-Checking the Agenda

The Chairperson's Responsibilities

Dealing with Difficult People

Nonparticipants

Loudmouths

Interrupters

Whisperers

Latecomers and Early Leavers

Adapting to Differences

Preparing the Minutes

Select a Recorder

Determine What Information to Include

Taking Minutes

Evaluating the Meeting

Balanced Meetings

GroupWork: Meet the People Problems

GroupAssessment: Post-Meeting Reaction (PMR) Form



MEETINGS, MEETINGS, MEETINGS

Approximately 11 million business meetings take place in the United States every day. The typical employee spends almost fifteen hours a week in meetings and may attend sixty formal or informal meetings a month.¹ Odds are that you've spent your share of time in meetings. Certainly you will be attending meetings in the future. Unfortunately, many of these meetings will not be productive or rewarding group experiences. One study suggests that "there is a direct correlation between time spent each week in meetings and an employee's desire to find another job."² A new member of a group describes the effect of poor meetings:

I was appointed to replace a member of an organization's board of directors. Apparently, the departing member had been asked to resign because she stopped attending meetings. Well, no wonder she lost interest! During the first meeting I attended, several people were no-shows, most of those attending arrived late, and the president of the board provided little leadership. We often postponed voting on important issues because members hadn't read the background material.

Many meetings fail to achieve their goal. Our own observations as well as studies and expert conclusions suggest the following explanations for why so many people criticize and dread meetings:

- The meeting was unnecessary and wasted time.
- The meeting's goal was unclear.
- The meeting failed to use or follow an agenda.
- There was not enough prior notice or time to prepare.
- The right people did not attend or were not invited.
- The meeting was held at the wrong time or place.
- The chairperson was ineffective.
- There was too much political pressure to conform or take sides.

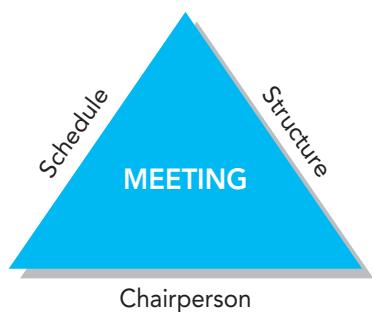
Meetings also fail because we take them for granted. Too often we resign ourselves to attending unproductive meetings rather than trying to improve the meetings we must attend. In one study, workers rated 69 percent of the meetings that they attended as "ineffective."³

If a group of people get together in the same room at the same time, you have a meeting, right? Wrong. You merely have a gathering of people in one place. We define a **meeting** as a scheduled gathering of group members for a structured discussion guided by a designated chairperson.

You can better understand the unique nature of a meeting by examining the three elements of the definition: schedule, structure, and chairperson. First, a

FIGURE 12.1

Three Essential Elements of a Meeting



meeting is usually scheduled in advance for a particular time and place; a coincidental gathering of group members does not constitute a meeting.

Second, meetings can be formal and highly structured or informal and loosely structured. A meeting using parliamentary procedure is an example of a formally structured meeting, whereas an emergency staff meeting would be less structured. The third element of a meeting is a designated chairperson. A **chairperson** is a group member who has been appointed or elected to conduct the meeting. The chairperson is not necessarily the group leader but is the person responsible for guiding the group through discussion topics or tasks in an orderly manner.

Note that two of the elements represent the dialectics of structure–spontaneity and leadership–followership. Effective groups understand that the amount of structure and spontaneity must be appropriate for the meeting’s goal and for the group’s norms and level of formality. Effective groups also understand that effective leadership should match the characteristics of group members as well as the nature of the group’s task.



PLANNING THE MEETING

The success or failure of a meeting largely depends on proper planning. Careful planning can prevent at least twenty minutes of wasted time for each hour of a group’s meeting.⁴ Answering the questions in Figure 12.2 can help you begin the process of planning an effective group meeting.

FIGURE 12.2

Meeting Planning Questions

Meeting Planning Questions

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

Why Are We Meeting?

The best way to ensure that your meeting does not waste time or frustrate members is to make sure that the meeting is really needed. Answering the following questions can help you decide whether to meet or not to meet:

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

TOOLBOX 12.1



Using Parliamentary Procedure

Many associations and organizations use parliamentary procedure to conduct their official meetings. Their constitution or bylaws may even require it. As we note in Chapter 9, parliamentary procedure is a systematic method for conducting a decision-making meeting in an orderly manner. The chief purpose of parliamentary procedure is to protect the rights of minority members while ensuring majority rule. Parliamentary procedure requires that members be called upon by the chairperson to speak, that voting follow set procedures, and that issues be discussed and debated in the order determined by the rules. Basic parliamentary procedure includes rules for making a motion, seconding a motion, amending a motion, and voting.

- *Main motion.* A new proposal is presented to the group: “I move that the search for a new marketing director be reopened.”
- *Seconding a motion.* A main motion must be seconded before it can be discussed: “I second the motion.”

- *Amendments.* A main motion can be amended by any member: “I move that the search for a new marketing director be reopened and that previous applicants be invited to reapply.”
- *Voting.* After a motion has been discussed, it can be accepted or rejected: “All those in favor say *aye*. All those opposed say *nay*.”

Most groups do not use parliamentary procedure to conduct their meetings. However, it is useful to know its basic principles and rules when making decisions about how to guide any group discussion. The Houghton Mifflin web site for this textbook includes a chapter that summarizes the principles, basic rules, and primary motions of parliamentary procedure.

**Online Study Center
General Resources**

Read the online chapter “Parliamentary Procedures” for more information.

In many situations, alternative forms of communication can prevent unnecessary group meetings. A memo, fax, email, voice-mail message, or one-to-one conversation may be sufficient. Yet, sometimes, calling a meeting is the fastest way to inform and interact with a group of people.

The most important step in planning a meeting is defining its goal as clearly as possible. A meeting’s goal is not the same as the meeting’s subject. The subject is the topic of the discussion. The goal identifies the desired outcome of the meeting. For example, if an executive calls her assistant and says, “Call a staff meeting next Thursday at 2:00 p.m.,” the assistant may ask, “What will the staff meeting be about?” “Employer-provided day care,” the executive replies. Has the executive revealed the goal of the meeting? No. We know only that the subject of the meeting is employer-provided day care. If the executive had said, “We need to determine whether our employer-provided day-care system needs to be expanded,” we would know the purpose or goal of the meeting.

It is important to ensure that a group can achieve the goal by the end of the meeting. If this cannot be done during a single meeting, the purpose statement

should be rewritten to focus on a more specific outcome. If necessary, a series of meetings should be scheduled in order to achieve the final goal.

Who Should Attend the Meeting?

The membership of many groups is predetermined. However, if a task does not require input from everyone or needs the expertise of only certain people, you should select participants who can make a significant contribution. When selecting meeting participants, try to include those members who will be directly affected by the outcome of the meeting. In addition, choose participants with special expertise, different opinions and approaches, and the power to implement decisions. Although you may be tempted to invite only those people who agree with your point of view, individuals who disagree or who represent minority opinions can provide a more balanced and realistic discussion of issues.

Make sure that your group is a manageable size. The larger the group, the more difficult it will be to manage. Try to limit a small group meeting to fewer than twelve participants; a group of five to seven members is ideal. In many situations, the size of the group is predetermined. For instance, an organization's bylaws may require that a majority of the board members attend in order to conduct a vote.

When Should We Meet?

The next step is deciding what day and time are best for the meeting. Should the meeting be in the morning, in the afternoon, after work hours, or during lunch? Avoid scheduling group meetings near holidays or at the beginning or end of the week when members may be less focused on working. Determine both what time the meeting should begin and what time it should end. For a time-consuming and difficult goal, you may decide that more than one meeting will be necessary.

Contact group members to find out when they are available, and schedule the meeting at a time when the most essential and productive participants are free. A meeting that only a few members can attend will not be very productive and will waste the time of those who do show up.

Where Should We Meet?

Choose a location that is appropriate for the purpose and size of the meeting. The room should be large enough, clean, well lit, not too hot or too cold, and



How would this meeting room affect a group's ability to interact and achieve a common goal?

(© Photonica/Getty Images)

furnished with comfortable chairs. Although you may have little control over such features, do your best to provide an appropriate and comfortable setting. Working in an attractive meeting room can make a group feel more important and valued. Also, the meeting room should be located away from distractions such as ringing phones and noisy conversations.

What Materials Do We Need?

A meeting agenda is the most important item to prepare and distribute to a group prior to the beginning of a meeting. The agenda tells the group what topics will be discussed and in what order. In addition to the agenda, you may need to distribute reports or other reading material that group members must review in order to contribute to a productive discussion. Distribute all materials far enough in advance of the meeting so that everyone has time to prepare. In addition, make sure that needed supplies and equipment, such as markers, paper, flip charts, projectors, or computers, are available to the participants.

TOOLBOX 12.2



Choose an Appropriate Meeting Site

The setting of a meeting can mean the difference between attentive members who are comfortable and able to fully participate in a discussion and distracted members who must contend with disruptions or an uncomfortable room. Groups often have several possible choices of meeting location. Typically, meetings occur in four types of locations:¹

- Your office
- Another person's office
- An on-site meeting room
- An off-site meeting room

There are advantages and disadvantages to each type of meeting site.² Your office may be convenient for you and may provide easy access to important reference materials. But if you are the boss, it may create an atmosphere in which members feel more like guests than like group members. In addition, distractions and interruptions can frustrate both you and other group members. Meeting in another group member's office can

prove equally distracting but could serve to boost the morale and status of that group member.

On-site meeting rooms, such as conference rooms in your organization's building, can avoid many of the distractions that occur in an individual's office. However, nongroup members may interrupt a group member with questions about other work issues. Off-site meeting rooms, such as space provided by a hotel or conference center, eliminate most distractions and have the added advantage of creating a neutral territory for everyone to come together. On the other hand, off-site meeting sites can be expensive and require travel time.

Business consultants Robert Heller and Tim Hindle point out that "the choice of location is vitally important to the success of a meeting. It is not only a question of comfort; participants must feel that the place is appropriate for the occasion."³

¹ Robert Heller and Tim Hindle, *Essential Manager's Manual* (New York: DK Publishing, 1998), p. 445.

² Heller and Hindle, p. 445.

³ Heller and Hindle, p. 444.



PREPARING THE AGENDA

An **agenda** is an outline of the items to be discussed and the tasks to be accomplished at a meeting. A well-prepared agenda can serve many purposes. First and foremost, the agenda is an organizational tool—a road map for the discussion that helps group members remain focused on their task. When used properly, an agenda helps participants prepare for a meeting by telling them what to expect and even how to prepare. An agenda also provides a sense of continuity for a group—it tracks members' assignments and provides status checks for work in progress. After a meeting, the agenda can be used to assess the meeting's success by determining the extent to which all items on the agenda were addressed.

When you are very busy or when a meeting is routine and predictable, writing up an agenda for a future meeting may seem like a waste of time. Just the opposite is true. Failure to plan and prepare an agenda denies a chairperson and a group one of the most powerful tools in meeting management.

Elements of an Agenda

Although the chairperson is responsible for preparing and distributing an agenda in advance of the meeting, group input can ensure that the agenda covers the topics that are important to the entire group. Figure 12.3 summarizes the elements of a traditional business meeting agenda.

Not all meetings will follow the traditional sequence of agenda items. The norms of a group and the goal of a meeting should determine the format of the agenda. For example, if a meeting is called to solve a problem, the agenda items may be in the form of questions rather than the key word format of a more formal agenda, as illustrated in Figure 12.4.

The questions will be determined by the problem-solving method that the group decides to use. In addition to identifying topics to be addressed during the meeting, agenda items should include any information that will help group members prepare for the meeting. The following guidelines can improve meeting productivity:

- Note the amount of time it should take to complete a discussion item or action. This will let the group know the relative importance of the item and help to manage the time available for discussion.
- Identify how the group will deal with each item by noting whether information will be shared with the group, whether the group will discuss an issue, or whether a decision must be made. The phrases *For Information*, *For Discussion*, and *For Decision* can be placed next to appropriate agenda items.
- Include the name of any person responsible for reporting information on a particular item or facilitating a portion of the discussion. Such assignments remind members to prepare for a specific topic or action item.

FIGURE 12.3**Elements of a Business Agenda**

Purpose of the Meeting	A clear statement of the meeting's objective and topic for discussion helps members prepare.
Names of Group Members	A list of all participants lets members know who will be attending.
Date, Time, and Place	The agenda clearly indicates the date, time, duration, and precise location of the meeting.
Call to Order	This is the point at which the chairperson officially begins the meeting.
Approval of the Agenda	This gives members an opportunity to correct or modify the agenda.
Approval of the Minutes	The minutes of the previous meeting are reviewed, revised if necessary, and approved by the group as an accurate representation of the last meeting's discussion.
Reports	Officers, individuals, or subcommittees report on the progress of their activities.
Unfinished Business	The agenda lists topics that require ongoing discussion or issues that the group was unable to resolve during the last meeting.
New Business	New discussion items are outlined and discussed in this section.
Announcements	Any items of information that the group needs to know but that do not require any discussion are announced.
Adjournment	The chairperson officially dismisses the participants and ends the meeting.

Determining the Order of Items

After you have identified all the agenda items, carefully consider the order in which the topics should be discussed. When several different topics must be addressed during a single meeting, they should be put in an order that will maximize productivity and group satisfaction. The following guidelines should help you determine how to balance the sequence of discussion topics in an agenda:

- Begin the meeting with simple business items and easy-to-discuss issues.
- Reserve important and difficult items for the middle portion of the meeting.
- Use the last third of the meeting for easy discussion items that do not require difficult decisions.

This sequence provides the group with a sense of accomplishment before it launches into more complex, controversial issues. If a difficult but important

FIGURE 12.4

Sample Discussion Meeting Agenda

Recycling Task Force
November 20, 2006, 1:00 P.M. – 3:00 P.M.
Conference Room 352

Purpose: To recommend ways to increase the effectiveness 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?

decision is taking more time than anticipated, the group may be able to deal with the less important discussion issues scheduled for the last third of the meeting at the next meeting. For example, suppose Ron is preparing an agenda for the next meeting of his local school district's Library Resources Committee. He anticipates a lengthy and controversial discussion of several new sex education books, but there are other items that must also be discussed at the meeting. Ron decides to begin the meeting by reviewing the budget and reporting on the effort to update media technology, then devote a significant amount of meeting time to discussing the sex education books. The last item on the agenda will be a discussion of plans to purchase foreign-language books, which can be addressed at another meeting if the group runs out of time. Sequencing the order of items in this way should allow the group to achieve its goals for this particular meeting.

Double-Checking the Agenda

Once you have determined what items need to be included in the agenda, check them against the meeting's stated goal.

- Are there any items that don't relate to the overall goal and that can be delayed until another meeting? If so, they should be eliminated from the agenda.

- Can all of the items on the agenda be addressed within the allotted meeting time? If there isn't enough time to cover all of the items, rephrase the meeting's goal to be more specific and eliminate some items.

Avoid overloading agendas by trying to do too much in a single meeting.⁵ For example, the group may not have time to both discuss the causes of a problem and start identifying possible solutions in the same meeting. You may need to reconsider the number of meetings and their goals.



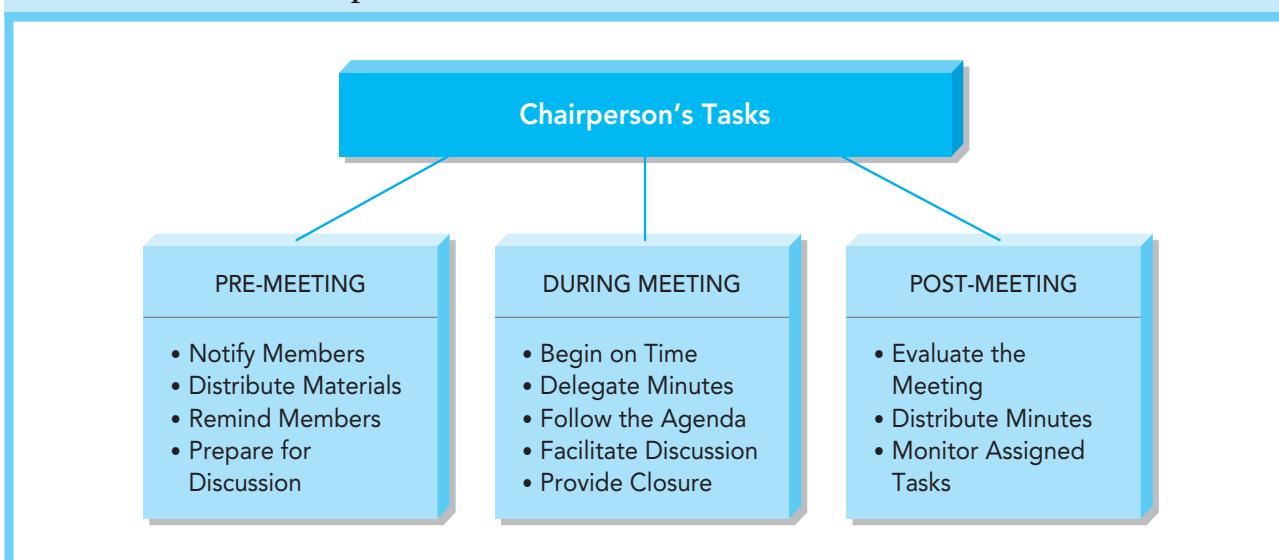
THE CHAIRPERSON'S RESPONSIBILITIES

If you are the chairperson of a meeting, you have a tremendous amount of influence over, and responsibility for, the success of the meeting. Although you may or may not be responsible for planning the meeting, you must conduct the meeting, and you are often responsible for following up on decisions after the meeting is over. Effective chairpersons facilitate productive discussions by making sure that they have fulfilled their responsibilities prior to, during, and after the meeting (see Figure 12.5).

Prior to a meeting, the chairperson must notify everyone who should attend, preferably in writing. The announcement should include a clear statement of the meeting's goal, what is expected of participants, and the time, location, and duration of the meeting. After the meeting has been announced, all the materials needed by participants, including the agenda, should be distributed in advance. As the chairperson, you should check with all members to confirm that they are planning to attend and, if necessary, send a brief reminder before the meeting. Also, you should be fully prepared for the discussion.

FIGURE 12.5

Chairperson's Tasks



During the meeting, effective chairpersons “balance strength with sensitivity; they balance knowing where they want the meeting to go with allowing the group to sometimes take it way off course; they balance having something to say with the restraint to say nothing; they assume the role of traffic cop in discussions without coming across with stifling authority.”⁶

The agenda will be your guide to keeping the discussion moving in an orderly way. The meeting should begin at the scheduled time. Make sure all members have a copy of the agenda, and determine who will take the minutes of the meeting. Attendance should then be taken and noted in the minutes. Ask the group to review the agenda and make any revisions that may be needed. After the completion of these preliminary tasks, you can proceed through the agenda items as planned. As chairperson, you should refrain from dominating the meeting. Your first priority is facilitating the group’s discussion.

Finally, the chairperson should provide a sense of closure to the meeting by briefly summarizing what has been accomplished and what still needs attention and action. If work has been delegated to different members of the group during the meeting, those responsibilities should be reviewed. If the group plans to schedule another meeting, ask for suggestions for agenda items and, if possible, set the date, time, and place of the next meeting.

TOOLBOX 12.3



Pace the Meeting

There is nothing worse than sitting through a meeting that moves too slowly, strays from the agenda, or lasts too long. A good chairperson allows enough time for everyone to participate but still ends the meeting on time. The following strategies can help keep your meetings moving at a comfortable pace:¹

- Start the meeting on time.
- Don’t waste time reviewing things for latecomers.
- Stick to the agenda.
- Place a time limit on each agenda item.
- Stay focused on the meeting’s goal.
- Schedule another meeting to discuss unfinished items.

As many as 73 percent of meeting participants admit to having done other work during

a meeting. Almost all of us have probably day-dreamed during a boring meeting.² Group members are usually most attentive during the first ten to fifteen minutes of a meeting. Their attention tends to decline during the middle portion of a meeting, then increase again before adjourning. Thus, the optimal meeting length is forty-five minutes.³ If your meeting must run longer, schedule breaks at least every ninety minutes. Giving members time to stretch, get food or drinks, or visit the restroom will make them more relaxed and ready to work when the meeting reconvenes.⁴

¹ Robert Heller and Tim Hindle, *Essential Manager’s Manual* (New York: DK Publishing, 1998), pp. 470–471.

² Jeff Davidson, *The Complete Idiot’s Guide to Getting Things Done* (New York: Alpha Books, 2005), p. 232.

³ Heller and Hindle, p. 471.

⁴ Heller and Hindle, p. 471.

If you are the chairperson, you should distribute the minutes of the meeting and any reports that were prepared. A chairperson's job does not end when a meeting adjourns; it may continue right up to the minute when a subsequent meeting is called to order. After the meeting is over, take time to evaluate its success and determine what should be done to improve the next meeting.



DEALING WITH DIFFICULT PEOPLE

A carefully planned meeting can fail if the chairperson or the group allows individuals to persist in behavior that disrupts the group process. All group members should address such behavior rather than assuming that the chairperson can or will resolve the problem. In their book *How to Make Meetings Work*, Michael Doyle and David Straus write that “dealing with these problem people is like walking a tightrope. You must maintain a delicate balance between protecting the group from the dominance of individual members while protecting individuals from being attacked by the group.”⁷ Although there can be as many potential problems as there are group members, there are a few particular types of behavior that cause most of the headaches.

Nonparticipants

You don't need full participation from all members all the time; the goal is to have a balanced group discussion over the course of the entire meeting. The group should be concerned, however, about members whose participation is always minimal. Are they anxious, unprepared, or uninterested?

Apprehensive or introverted participants should not be forced to contribute before they are ready to do so. At the same time, though, make sure you provide opportunities for reluctant members to become involved in the discussion. When nonparticipants do contribute, respond positively to their input to demonstrate that you see the value in their ideas.

Loudmouths

A member who talks more than the others is not necessarily a problem. However, when a person talks so much that no one else gets a chance to speak, the group has a loudmouth problem. At first, allow loudmouths to state their ideas, and acknowledge that you understand their positions. It may be necessary to interrupt them to do so. Then shift your focus to other members or other issues by asking for alternative viewpoints. If a loudmouth continues to dominate, remind him or her of the importance of getting input from everyone. The next time the group meets, you may want to assign the loudmouth the task of taking minutes as a way of shifting her or his focus from talking to listening and writing.

Interrupters

Sometimes group members are so preoccupied with their own thoughts and goals that they interrupt others when they have something to say. Although most interrupters are not trying to be rude, their impatience and excitement cause them to speak out while other members are still talking. When a group member continually interrupts others, it is time to interrupt the interrupter. Invite the previous speaker to finish making her or his point. A more aggressive option is simply not to allow the speaker to be interrupted—to intervene and say, “Let Mary finish her point first, and then we’ll hear other viewpoints.”

Whisperers

A person who carries on a confidential conversation with another group member during a meeting can distract everyone else. The interference caused by members who are whispering or snickering makes it hard for people to concentrate and listen to other members. Directing eye contact toward such sideline conversations can make the offenders more aware of their disruptive behavior. If the behavior persists, ask the talkers to share their ideas with the group. This will probably stop the behavior and may uncover issues that deserve discussion.

Latecomers and Early Leavers

People who arrive late and leave early can distract those who have managed their time well enough to arrive on schedule and stay through the entire meeting. If you are the chairperson, start the meeting at the scheduled time, and avoid wasting meeting time by stopping to review what has already been accomplished for the benefit of latecomers. Let latecomers sit without participating until they have observed enough of the meeting to contribute to the discussion. We don’t recommend that you publicly reprimand or embarrass latecomers or early leavers, but you may want to talk to them after the meeting about what can be done to enable them to attend the entire meeting.

Members who come in and out of the meeting in order to do other work at the same time cannot be full participants. Such behavior is distracting; it communicates to the rest of the group that the meeting is not very important. These members should be asked politely either to stay for the entire discussion or to take care of other work in advance.

When you have to confront a dysfunctional member, be sensitive and focus on the behavior rather than making personal attacks. Point out the behavior and suggest an alternative, and also indicate the consequences if the alternative is not followed. Don’t overreact; your intervention can be more disruptive than the problem member’s behavior. It is best to begin with the least confrontational approach and then work toward more direct methods as necessary.

GROUPTECH

Virtual Group Meetings

Deborah Duarte and Nancy Snyder point out that “technology cannot make up for poor planning or ill-conceived meetings. In fact, it can make the situation worse.”¹ Fortunately, the same principles that apply to planning a productive face-to-face meeting apply equally well to planning virtual meetings. Just as for any meeting, the goal of the meeting must be clear, and all participants should receive an agenda in advance. If your virtual meeting will involve several technological applications, your agenda might indicate which items will rely on which technology. For example, if brainstorming is planned, the agenda might indicate that an anonymous input feature will be used. This knowledge will give group members the opportunity to prepare for the discussion and to make sure that they can use the necessary technology adequately.

When deciding who should attend a virtual meeting, avoid the temptation to include too many participants. Virtual meetings take place electronically. Thus, they typically are not limited in size because of the number of seats in a conference room. However, including too many participants is a mistake. It is easier for members to become nonparticipants in virtual meetings than in face-to-face meetings. Furthermore, opportunities to participate become more limited when too many members are involved. Include only people who actually need to attend the virtual meeting, and keep the group small enough to allow everyone to contribute actively.

Determining when your group should meet can be simplified through the use of technology. If you work for a company or organization with a computer network, you may have access to a calendar program with a group scheduling feature. Such a program can provide an instant list of times and dates when all members will be available. The program will schedule the meeting,

notify the participants by email, and enter the meeting on their calendars.

When planning a face-to-face meeting, you need to determine where your group should meet. When planning a virtual meeting, you should decide which technology can best serve the meeting’s goal. Should your group meet via an audioconference or a videoconference? Can the group accomplish its goal during an online text-only meeting? You also may need to determine what specific technology will be required to accomplish specific tasks. For example, how will the group brainstorm ideas, organize those new ideas, and vote during its virtual meeting? The answers to these questions will depend on the goal of your meeting, the specific tasks on the agenda, and your group’s access to technology.

In addition to distributing the agenda and any other documents, make sure that the participants have access to the technology and can use it adequately. If necessary, your group should schedule a separate training session at which participants can learn how to use any equipment or programs that will be needed during your virtual meetings. If group members are able to use the many devices and applications that are available, communication technologies can enhance your group’s ability to work together from remote locations. However, if group members are uncomfortable with or unable to take advantage of such technologies, they will find your virtual meetings frustrating and unproductive. The group will end up focusing on technical problems rather than addressing its agenda. Finally, always test the technology that you will be using prior to meeting with the group. Careful planning can ensure that your virtual meetings are productive and efficient.

¹ Deborah L. Duarte and Nancy Tennant Snyder, *Mastering Virtual Teams: Strategies, Tools, and Techniques That Succeed*, 2nd ed. (San Francisco: Jossey-Bass, 2001), p. 157.



ADAPTING TO DIFFERENCES

Very often, group members from different cultural, ethnic, and age groups do not share similar expectations about group roles and individual behavior in meetings. In some cultures, it would be considered disrespectful for a young group member to interrupt an older one or for a new group member to challenge a veteran member. In such cases, it may be tempting to interpret lack of participation as inattention or lack of interest, when, in fact, the group member is demonstrating a high degree of respect for the group and its leader.

At one college, the president appointed an advisory council to coordinate activities designed to improve the racial climate on campus. One member of the group reported the following observation:

One council member was a former diplomat from a West African country. He rarely spoke, but when he did, he always began with a very formal “Madam Chairman.” After that, he would deliver a three- to five-minute speech in which he would summarize what had been said and offer his opinion and recommendations. When he was finished, he would thank everyone for listening. At first we didn’t know how to respond. It was so formal, so complex. Eventually we learned to expect at least one “speech” from this member. We learned to listen and respond to a very different style of participation. This member defined his participant role very formally and acted accordingly. Patience on the part of other participants helped the group accept and adapt to his custom of formality.

Group members may represent different ages, genders, educational and work backgrounds, religions, political viewpoints, and cultures. All of these elements can affect how a meeting is conducted and how well a meeting accomplishes its goals. Adapting to the diversity of group members involves understanding and accommodating differences while pursuing shared goals.



PREPARING THE MINUTES

The **minutes** of a meeting are the written record of a group’s discussion and activities during the meeting. The minutes record discussion issues and decisions for those who attended a meeting and provide a way to communicate with those who did not attend. By looking through a group’s minutes over a period of time, you can learn about the group’s activities, measure how productive the group has been, learn about individual members’ contributions to the group, and know whether group meetings tend to be formal or informal. Of most importance, however, the minutes help prevent disagreement over what was decided in a previous meeting and what tasks individual members agreed to do.

Select a Recorder

The chairperson is ultimately responsible for the accuracy and distribution of the minutes. However, during the meeting, the chairperson must be free to facilitate the group's discussion. Therefore, the task of taking minutes should be delegated to another group member. The group may designate a recorder or secretary to take minutes at every meeting, or members can take turns volunteering to do the minutes. Regardless of who takes the minutes, however, the chairperson is responsible for checking their accuracy and distributing copies to all group members.

Determine What Information to Include

For the most part, the format of the minutes should follow the format of the agenda. If you are assigned to take minutes, you will probably include much of the following information:

CLOSE TO HOME JOHN MCPHERSON



As soon as Mrs. Felster began to read the minutes of the last meeting, the board members knew she was not going to work out as the new secretary.

CLOSE TO HOME © 1994 John McPherson/Dist. of UNIVERSAL PRESS SYNDICATE. Reprinted with permission. All rights reserved.

- Name of the group
- Date and place of the meeting
- Names of those attending
- Name of the person who chaired the meeting
- Names of absent members
- The exact time the meeting was called to order
- The exact time the meeting was adjourned
- Name of the person preparing the minutes
- Summary of the group's discussion and decisions, using agenda items as headings
- Specific action items

Action items are tasks that individual members have been assigned to do after the meeting. An action item includes the person's name, the assignment, and the deadline. For example, an action item might look like this: "Action: Mark Smith will review the prices charged by competing companies by the next meeting." It is helpful to underline action items in the minutes to make it easier to refer back to them when reviewing the group's progress.

FIGURE 12.6

Sample of Informal Minutes

Domestic Violence Class Discussion Group Meeting
February 10, 2006, 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)

Taking Minutes

Well-prepared minutes are brief and accurate. When summarizing a group's discussion, remember that the minutes are not a word-for-word record of everything that every member has said. To be useful, they must briefly summarize the discussion. The following guidelines should be used when taking minutes:

- Instead of describing the discussion in detail, write clear statements that summarize the main ideas and actions.
- Make sure to word decisions, motions, action items, and deadlines exactly as the group makes them in order to avoid future disagreements and misunderstandings.
- If there is any question about what to include in the minutes at any point during the meeting, ask the group for clarification.

- Obtain a copy of the agenda and any reports that were presented to attach to the final copy of the minutes. These documents become part of the group record along with the minutes.

Immediately after the meeting, you should prepare the minutes for distribution. The longer you delay, the more difficult it will be to remember the details of the meeting. In some meetings, minutes may be taken on a laptop computer. Once the minutes have been prepared, they should be given to the chairperson for review. When a group has officially approved the minutes, they are final and become the official record of the meeting.

ETHICAL GROUPS



Use Discretion When Taking Minutes

The person charged with taking minutes has an ethical obligation to exercise good judgment when deciding what to include in the minutes and what to omit. Everything that is included in the minutes must accurately reflect the major discussion issues and decisions. At the same time, you must make decisions about what would be inappropriate or harmful to include in the official record of the group's meeting.

There are times when a group does not want portions of its discussion recorded in the minutes. For instance, groups that are discussing sensitive legal or personnel issues often must keep information confidential. Confidentiality is compromised if the minutes are made available to individuals outside of the group. If the meeting agenda will include some confidential items, make sure that all group members understand that some information is not to leave the group and should not be recorded in detail in the minutes.¹

During a meeting, group members may make comments that would not be wise to include in the minutes. For example, a group that vents its frustration with a boss that the members don't like will not want to read in the minutes that

"The group agreed that Dan is unreasonable and insensitive." Groups often express frustrations and complaints within the confines of a meeting. Including such comments in the minutes can stifle open communication and is not necessary for making the meeting minutes useful.

The group's recorder must balance the need for accuracy with discretion. The following guidelines can help you determine when to include information and when to leave it out:

- 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 it should be worded in the minutes.
- Always keep in mind that the minutes are often the only record of the meeting and may be read by individuals outside of the group.

¹ Robert Heller and Tim Hindle, *Essential Manager's Manual* (New York: DK Publishing, 1998), p. 429.



EVALUATING THE MEETING

To determine the effectiveness of meetings and identify areas for improvement, chairpersons and participants should evaluate their meetings. There are a number of ways to determine the success of a meeting:

- Throughout the meeting, the chairperson may ask for comments and suggestions before moving on to the next item. This feedback allows the group to modify its behavior and improve its interaction when discussing the next item.
- At the end of the meeting, the chairperson can briefly summarize his or her perceptions of the meeting and ask for comments and suggestions from the group before adjourning.
- After the meeting, participants can be approached individually for their comments and suggestions for improving the group's next meeting.
- A Post-Meeting Reaction Form can be distributed to members before adjourning.

A **Post-Meeting Reaction (PMR) Form** is a questionnaire designed to assess the success of a meeting by collecting written reactions from participants. The chairperson should prepare the form in advance of the meeting, distribute it at the meeting, and collect it before participants leave. Regardless of the format of the questions, a PMR form should ask questions about the issues being discussed, the quantity and quality of group interaction, and the effectiveness of meeting procedures. The feedback from the group should then be used to improve the next meeting. The sample PMR form in the assessment section at the end of this chapter contains many of the typical questions asked to evaluate a group's meeting.



BALANCED MEETINGS

Just as every group is unique, every meeting is different. Planning and conducting effective meetings require balanced decision making. On the one hand, the group should strive for an ideal meeting, but, at the same time, it should understand and adapt to what can realistically be accomplished in a single meeting. Even in a short meeting, effective groups and group members attempt to balance the competing components of groupwork by taking a *both/and* approach to resolving dialectic tensions.

The 3M Meeting Management Team describes the critical role of the chairperson as “a delicate balancing act” in which chairpersons must

. . . influence the group’s thinking—not dictate it. They must encourage participation but discourage domination of the discussion by any single member.

They must welcome ideas but also question them, challenge them, and insist on evidence to back them up. They must control the meeting but take care not to overcontrol it.⁸

Effective meetings achieve a balance between the different needs of individual members and the necessity of accomplishing the group's goal. Balanced meetings result in greater productivity and member satisfaction.

GROUPWORK

Meet the People Problems

Goal: To understand the principles and apply textbook suggestions to other common people problems that arise during meetings

Participants: Groups of five to seven members

Procedure

1. Read the descriptions of the five additional people problems that often arise in meetings.
2. As a group, prepare at least two strategies for dealing with each type of people problem.
3. Groups should share their strategies with the entire class and discuss the following question: What general, overriding principles emerge as effective strategies for dealing with difficult members?

People Problems

- The *Broken Record* keeps bringing up the same point over and over.
- The *Headshaker* nonverbally disagrees in a dramatic and disruptive manner. Headshakers shake heads, roll eyes, cross and uncross legs, slam books shut, push chairs back, or madly scribble notes after someone has said something.
- The *Attacker* launches personal attacks on another group member or on you as facilitator.
- The *Know-It-All* uses credentials, age, length of service, or professional status to argue a point: "Well, I'm the one who has a Ph.D. in physics, and I know it doesn't work that way"; "I have been working in this business longer than anyone else here, and I know that will never fly."
- The *Backseat Driver* keeps telling you what you should be doing: "I would have let people discuss the issue more before brainstorming"; "I would move on to the next issue if I were you."

Source: Based on "How to Be a Good Facilitator," from *How to Make Meetings Work* by Michael Doyle and David Straus, copyright © 1976 by Michael Doyle and David Straus. Used by permission of Berkley Publishing Group, a division of Penguin Group (USA) Inc.

GROUP ASSESSMENT

Post-Meeting Reaction (PMR) Form

Directions. After a selected meeting, complete the following PMR form by circling the number that best represents your answer to each question. After compiling the answers from all participants, including the chairperson, use the results as a basis for improving future meetings.

1. How clear was the goal of the meeting?

unclear	1	2	3	4	5	clear
---------	---	---	---	---	---	-------

2. How useful was the agenda?

useless	1	2	3	4	5	useful
---------	---	---	---	---	---	--------

3. Was the meeting room comfortable?

uncomfortable	1	2	3	4	5	comfortable
---------------	---	---	---	---	---	-------------

4. How prepared were group members for the meeting?

unprepared	1	2	3	4	5	well prepared
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5. Did everyone have an equal opportunity to participate in the discussion?

limited opportunity	1	2	3	4	5	ample opportunity
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6. Did members listen effectively and consider different points of view?

ineffective listening	1	2	3	4	5	effective listening
-----------------------	---	---	---	---	---	---------------------

7. How would you describe the overall climate of the meeting?

hostile	1	2	3	4	5	friendly
---------	---	---	---	---	---	----------

8. Were assignments and deadlines made clear by the end of the meeting?

unclear	1	2	3	4	5	clear
---------	---	---	---	---	---	-------

9. How would you rate this meeting overall?

unproductive	1	2	3	4	5	productive
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Additional Comments:

NOTES

1. Jeff Davidson, *The Complete Idiot's Guide to Getting Things Done* (New York: Alpha Books, 2005), p. 232.
2. Matthew Gilbert, *Communication Miracles at Work: Effective Tools and Tips for Getting the Most from Your Work Relationships* (Berkeley, CA: Conari Press, 2002), p. 173.
3. *The Week*, April 2, 2005, p. 35. Study reported in CNNmoney.com.
4. Karen Anderson, *Making Meetings Work: How to Plan and Conduct Effective Meetings* (West Des Moines, IA: American Media Publishing, 1997), p. 17.
5. Charlie Hawkins, "First Aid for Meetings," *Public Relations Quarterly* [online], 42 (1997), p. 2. Available at <http://db.texshare.edu/ovidweb/ovidweb.cgi>. Accession Number: 03528854.
6. Bobbi Linkemer, *How to Run a Meeting That Works* (New York: American Management Association, 1987), p. 42.
7. "How to Be a Good Facilitator," from *How to Make Meetings Work* by Michael Doyle and David Straus, copyright © 1976 by Michael Doyle and David Straus. Used by permission of Berkley Publishing Group, a division of Penguin Group (USA) Inc.
8. 3M Meeting Management Team, with Jeannine Drew, *Mastering Meetings: Discovering the Hidden Potential of Effective Business Meetings* (New York: McGraw-Hill, 1995), p. 78.