DRIVING CHANGE

# Planning and Leading Effective Meetings

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ILLINOIS EXTENSION

# What meetings can be?

Meetings can offer a platform for generating ideas, detecting and solving problems, assigning tasks, communicating and seeking consultation,....[1]

[1] Source: LeBlanc, Linda A. and Nosik, Melissa R., "Planning and Leading Effective Meetings," https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6743516/

# Participants perceive your meeting as "good" if you....

- use of an agenda

- keep minutes

- maintain punctuality

- appropriate meeting environment

- have a meeting leader[3]

[2] Source: Leach, D.J., Rogelberg, S.G., Warr, P.B. et al. Perceived Meeting Effectiveness: The Role of Design Characteristics. J Bus Psychol 24, 65–76 (2009). https://doi.org/10.1007/s10869-009-9092-6
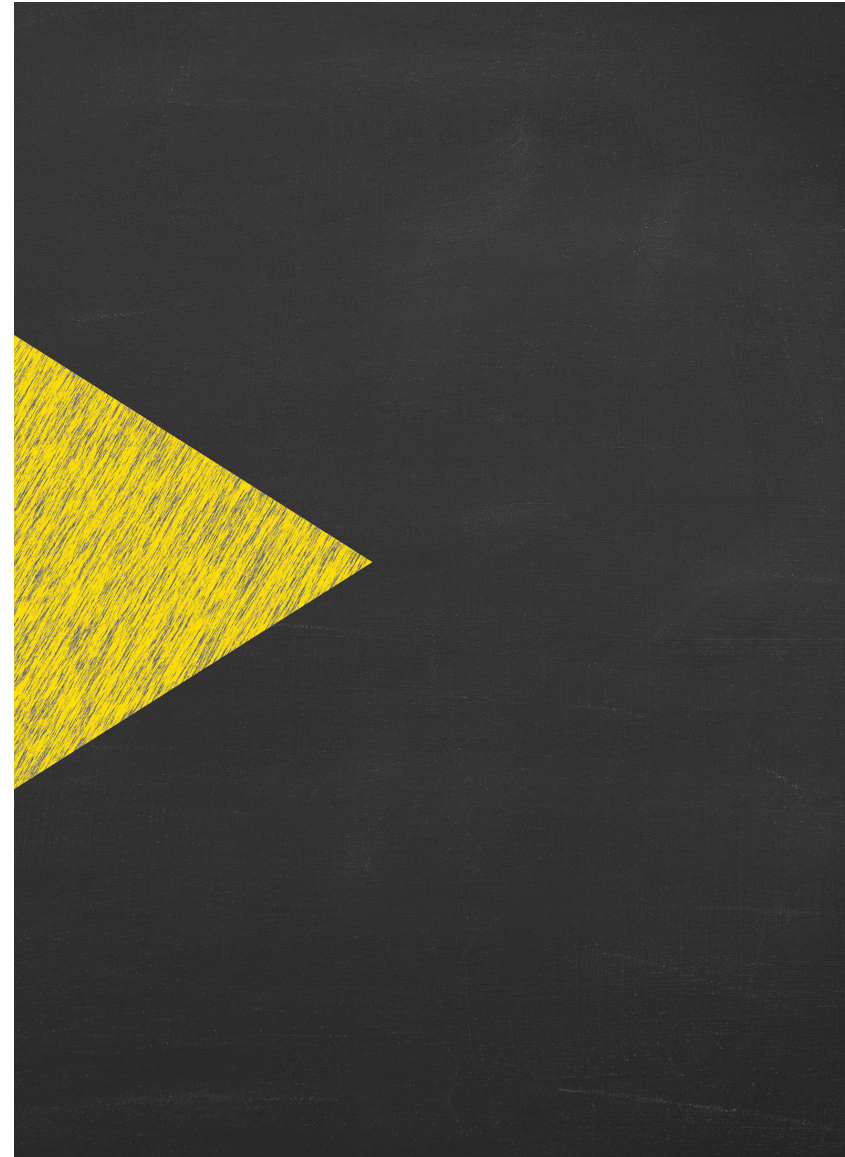
# Stakeholder Questions?

- Are shorter more frequent meetings more productive than longer less frequent meetings?

- How do you put together an effective agenda to keep the meeting on task to be productive?

- How can you professionally navigate conversations that have gone off subject back to the agenda topic? When you start losing the participant's interest or focus….what do you do?

- Any tips about effective note-taking?

# Before a meeting ask the following questions

- Do I really need a meeting? Meetings are costly take some time to examine how many people and how much time will be spent

- What are the goals or desired outcomes of this meeting?

- Can I achieve the goals without a meeting? (email, phone calls etc)

- Is the purpose of the meeting reflected on the agenda?

Meeting attendance has changed!

# Effective Hybrid Meetings

- Develop a Stewardship Mindset
- Use Video
- Don't Over Invite
- Set Time Properly
- Sharpen the Agenda

[3] Source: Rogelberg, Steven G. "The Surprising Science Behind Successful Remote Meetings Research-based insights can improve your remote meetings and keep participants engaged." https://sloanreview.mit.edu/article/the-surprising-science-behind-successful-remote-meetings/, May 21, 2020.

# Develop a Stewardship Mindset

- The best meeting leaders recognize their role to protect the time of others

- The best meeting leaders are deliberate in meeting decisions from start to finish

- Being intentional doesn't have to take much time.

# Use Video

- Remove social loafing tendency
  - A human tendency to reduce effort and motivation when working in a group.
  - Increases the more anonymous one feels, akin to hiding in a crowd, and can increase during remote meetings due to the virtual barrier between team members.
  - Using video, along with inviting as few people as possible, helps counter that sense of anonymity.

# Don't Over Invite

Remote meeting quality plummets as size increases

Record and make available for others

Let staff members who are not directly impacted off the hook.

Give people the option to attend future meetings on the topic to minimize feelings of marginalization
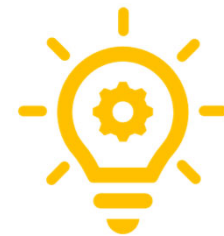
# Set Time Properly

Given Short Attention Spans Consider 15, 20, 25-minute meetings

Reducing meeting length creates positive pressure

research shows that groups operating under some level of time pressure perform more optimally given increased focus and stimulation.

# Sharpen the Agenda

- Try organizing the agenda as a set of questions to be answered rather than a set of topics to be discussed.

- By framing agenda items as questions, you have a better sense of who really has to be invited to the meeting.

- Once the questions have been answered, you know when to end the meeting — and you can easily gauge if the meeting has been successful.

# Improving your Agenda

If you make no other changes- Make your agenda actionable.

"Create a subcommittee of two or three people to help the chair plan agendas.

Spend time at the end of each meeting identifying key issues for the next agenda.

Send out a call for agenda items before the meeting."

[4]Source: https://www.talent.wisc.edu/academicleadershipsupport/LeadMeetings/BestPractices/CreatinganActionableAgenda/tabid/106/Default.aspx

# AGENDA (Sample)

**Aims:** [Identify the overall aims for the meeting.]

**Invited:**

**Read Ahead of Time:**

**Bring to Meeting:**

Times          Topics          Discussion Leader

[4] Source: https://www.talent.wisc.edu/academicleadershipsupport/LeadMeetings/BestPractices/CreatinganActionableAgenda/tabid/106/Default.aspx

# Elaborate Meeting Agendas

- Date, time, location
- Establish roles during your meeting (timer, notetaker etc)
- Goals of the meeting
- Questions that need answered (Those that submit question are encouraged to also identify a Solution), Notetaker needs to identify what Action will be taken and if this Resolves the problem.
- Purpose: Topic, (Event planning, seeking input, information, decision making, problem solving, other) Who brought the topic, minutes, expected outcomes
- Tasks to complete (task, deadline, who is responsible, important dates both for the group and then for the community.

| | Purpose | | | |
|---|---|---|---|---|
| | I = Seeking Input | INF = Information | D = Decision Making | P = Pr |

| | Purpose | Presenter(s) | Minutes | Expected Outcon |
|---|---|---|---|---|
| tems | INF | Alfred | 5 | **Establish Success in this Area by:** • Sharing Team Meeting Agendas with Google Drive, OneDrive, Box, etc.) |
| | | | | • Establishing a deadline for attendees evening prior to the meeting) • Inform attendees what type of inform discuss agenda items during a meetin |
| ning I | I | Area Coordinator | 10 | • Who can email out the RA Programm • Have Programming Budgets been fina is the ideal deadline for completing th • Are there any pending February prog follow-up with on my end? |

| Tasks to Complete | | |
|---|---|---|
| **Task** | **Deadline** (Date, Time, & Location) | |
| r this Meeting Agenda Template | Immediately Following this Video | |
| rom recent Programs to AC | Tuesday, 2/18 @ 11:59pm via Email to AC | |

**Important Department Dates:** Tuesday, February 18 - Tuesday, February 25

[5] Source: https://www.youtube.com/watch?v=1HT0yLYV2Jg

# Manage Productivity[3]
## During Meetings

- Start and end on time.

- Start the meeting well.

- Establish Norms

- Actively Facilitate

- Use Tools

[3] Source: Rogelberg, Steven G. "The Surprising Science Behind Successful Remote Meetings Research-based insights can improve your remote meetings and keep participants engaged." https://sloanreview.mit.edu/article/the-surprising-science-behind-successful-remote-meetings/, May 21, 2020.

# Dealing with Meeting Dominators

Structure the meeting. Stop free-for-all conversation and pose questions instead.

Utilize small group work even during a large meeting.

As the facilitator your job is to get as many ideas from as many people as possible. Call on those who you have not heard from... Don't say anyone else have comments?

Recap what was said by the person dominating the conversation and then ask if anyone has an alternative view? Or I would appreciate hearing another point of view.

Take the person aside during a break and thank them for their initiative and during the 2nd half of the meeting let them know you will be trying to get other people to share their thoughts.

[7] Source: https://www.talent.wisc.edu/AcademicLeadershipSupport/Portals/0/2MeetingsDomination.htm

# Notetaking Best Practices

Take pre-meeting notes to prepare

Base your note-taking structure on the meeting agenda

Summarize effectively by highlighting takeaways

Turn your notes into action items

Use your notes to look back (share where you've been and where you are going)

[9] Source: Kitch, Bryan, "5 Tips to Take More Effective Meeting Notes," https://www.mural.co/blog/effective-meeting-notes, April 27, 2022

# Best way to end a meeting

- End with an Action Plan

- Leave the last few minutes of every meeting to discuss the next steps.  Take the time to recap at meetings and plan for the next meeting.

- This discussion should include deciding who is responsible for what, and what the deadlines are.

# Sources Cited:

[1] LeBlanc, Linda A. and Nosik, Melissa R., "Planning and Leading Effective Meetings," https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6743516/

[2] Leach, D.J., Rogelberg, S.G., Warr, P.B. et al. Perceived Meeting Effectiveness: The Role of Design Characteristics. J Bus Psychol 24, 65–76 (2009). https://doi.org/10.1007/s10869-009-9092-6

[3] Rogelberg, Steven G., "The Surprising Science Behind Successful Remote Meetings, Research-based insights can improve your remote meetings and keep participants engaged.," https://sloanreview.mit.edu/article/the-surprising-science-behind-successful-remote-meetings/, May 21, 2020.

[4] https://www.talent.wisc.edu/academicleadershipsupport/LeadMeetings/BestPractices/CreatinganActionableAgenda/tabid/106/Default.aspx

[5] https://www.youtube.com/watch?v=1HT0yLYV2Jg

[6] https://www.merriam-webster.com/dictionary/stewardship

[7] https://www.talent.wisc.edu/AcademicLeadershipSupport/Portals/0/2MeetingsDomination.htm

[8] https://smartway2.com/blog/the-ideal-meeting-length-is-shorter-than-you-think/#:~:text=Meeting%20Length%20Vs.&text=Take%20the%20following%20chart%20from,attention%20drops%20off%20to%2084%25.

[9] Kitch, Bryan, "5 Tips to Take More Effective Meeting Notes," https://www.mural.co/blog/effective-meeting-notes, April 27, 2022

# Questions ?

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