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# *Effective Meeting Facilitation*

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# *The basic components of effective meetings*

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- Everyone cooperates to discuss issues in a particular way
- Create a common agenda
- All members take on one of four definite roles and responsibilities:  
"participant, recorder, boss, facilitator"

# *Discuss issues in a particular way*

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- stay on the topic at hand
- if other topics come from discussion, place on agenda for later discussion
- agree to use a specific method to address the agenda item

# *Create a common agenda*

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- List the issues to be addressed and the person who wants the discussion
- Choose a method of discussion for each agenda item (how to address each of those tasks?)

# *Here are six ways to discuss an item*

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- information sharing (reporting)
- problem solving (define; analyze; solve)
- planning
- evaluating (clarifying)
- decision making
- brainstorming (generate ideas, **don't reject** even outrageous ones)

## *More about a common agenda*

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- Set a time limit for each item of discussion
- Create priorities among the agenda items; consider beginning with unfinished issues from previous meeting
- Support the group sticking to the agenda

# *Agenda Example*

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Issue	Person	Method	Time
Budget	Sally	decision	20 min
CEO evaluation	Tom	reporting	15 min
Strategic planning	Jose	planning	60 min
Personnel guidelines re: time off	Tony	brainstorming	20 min
TQM report	Barbara	reporting	20 min

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*The Four Types  
of Roles  
in an Effective  
Meeting*

# *Meeting Roles for the "Participants"*

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- Take responsibility yourself for the results of the meeting
- Prepare ahead by doing what you agreed to do in previous meetings
- Arrive on time with note-taking material
- Keep yourself alert, aware during the meeting

# *Participants....*

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- Don't spend long periods of time silent, especially when you have ideas-feelings
- Do not attack members personally
- Fully grapple with ideas and conflicts presented, in the spirit of solving problems for the whole team
- Keep the facilitator and recorder neutral: insure they don't favor any faction

# *Participants...*

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- Address the topic in the way that you've agreed on the agenda
- Insure meeting records are accurate
- Listen accurately: don't distort what others are saying
- Keep within the time-frames
- Don't evaluate ideas before they are developed

## *Participants...*

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- Don't be defensive about your ideas if criticized
- Take notes on actions and deadlines for which you are responsible
- Bump issues that were not addressed into another meeting time, and maintain that information to build the next agenda
- Be alert for cynical, mistrustful, or bored comments and their impact, and be willing to avoid or disrupt this type of commentary

# *Meeting Role for the "Boss"*

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- Don't try to play neutral and give away your power
- Delegate the task of running the meeting to the staff
- Know why the meeting is being held and what you want from it
- Know how much participation you really want from your staff

# *Boss...*

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- Don't seek input, then ignore it
- Retain the power to stop what is happening and change the format
- Push for accountability about the issues, decisions, and actions
- After the meeting: make the decisions made there official by acting on them, and holding to them, without altering the meaning or the intent

# *Meeting Role for the "Facilitator"*

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- Coordinate the logistics prior to the meeting:  
Circulate the agenda, set up the meeting room
- Begin the meeting by helping the group build the agenda
- Ask the first person to begin with their prioritized issue
- Begin with a loose rein, helping redirect when necessary or requested by group

## *Facilitator...*

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- Work to remain neutral and build trust among the members
- Insure participants employ the most effective meeting methods
- Offer positive, supportive comments to the group about its efforts

# *Facilitator...*

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- Keep the group focused on both the issue, AND the way they are to direct themselves to that issue
  - If making a presentation, don't allow discussion to begin at this point
  - If brainstorming, don't allow criticism of ideas
  - If making a decision, keep on this path

# *Facilitator...*

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- Encourage participation
  - ask quiet members to speak up
  - ask members who often talk to quiet down
  - redirect members to the topic & method
  - stay silent if the meeting is working
  - ask people to summarize

## *Facilitator...*

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- Step into conflict that becomes too heated, polarized, or begins to be an attack on a meeting member
  - acknowledge the strong emotions
  - offer deferred or immediate methods
  - return the group focus to the meeting method that has been chosen to assist their mutual support of one-another

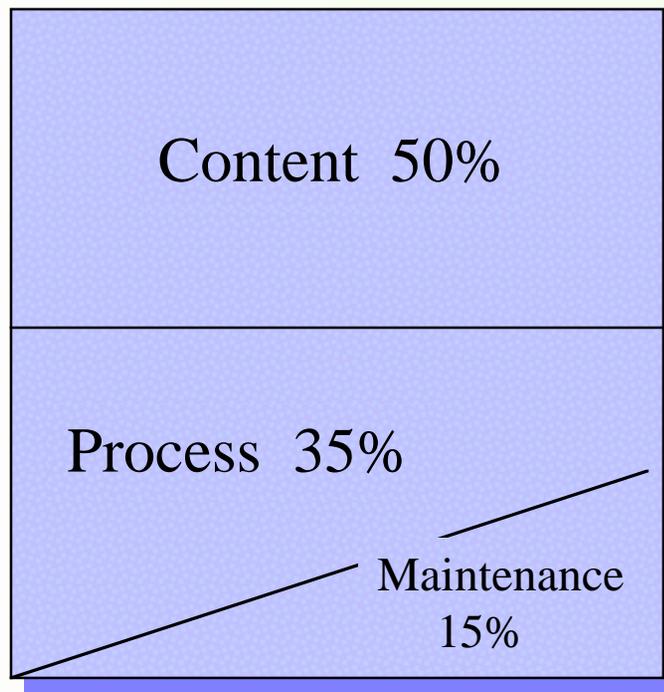
# *Facilitator...*

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- Talk privately with problem people who are disruptive to the meeting process; common disruptions:
  - being chronically late
  - being silent
  - being cynical bored, critical, aggressive, etc...

# *How much to intervene?*

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Content = the discussion elements, topics

Process = how the discussion goes forward

Maintenance = meeting the psycho-social needs

# *Some common facilitator errors*

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- focus too soon on results
- forgetting to ask 'how it feels'
- talking too much or too little
- not risking an intervention
- getting drawn into content
- not using your intuition
- not trusting the group process

# *Meeting Role for the “Recorder”*

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- Ensure that the meeting will have the necessary materials for notes
  - easel
  - markers
  - large newsprint note pad
  - masking tape
- Add titles, dates, and page numbers to the sheets

## *Recorder...*

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- Create a 'group memory' (take notes), making a visual record of comments
- Separate, label the issues in clear form
- Capture only essential ideas, key words and phrases
- DO NOT note that certain people took certain positions
- Use the technical group language

## *Recorder...*

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- Write legibly with no attention to spelling
- Tear off each full sheet, tape it to the wall, continue
- Collate the sheets at meeting's end
- Get the sheets to the typist with instructions for distribution

# *Creative Problem-Solving*

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- substitute something
- combine things
- adapt something
- modify or magnify
- put something to another use
- eliminate something
- reverse or rearrange things

# *Action plans*

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- choose a task
- decide how to pursue that task
- describe what outcome you seek
- set up a time-line
- complete the task

# Action Plans

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<b><i>Person</i></b>	<b><i>Task</i></b>	<b><i>Method</i></b>	<b><i>Result</i></b>	<b><i>Date</i></b>
<b><i>Sally Sanchez 520/327-8513</i></b>	<b><i>Analyze the post-grad education of agency clinicians</i></b>	<b><i>gather hours of clinical supervision, weekly average direct service, continuing education</i></b>	<b><i>presentation to staff with proposals for actions to increase expertise</i></b>	<b><i>11/12/96</i></b>
<b><i>Jack Elam 602/955-8858</i></b>	<b><i>Assess the cost-effectiveness of computers for clinician use</i></b>	<b><i>gather data on current costs of hardware and personnel that support current clinical efforts and compare to costs of clinical hardware, training, data input</i></b>	<b><i>presentation to executive director with recommendations for funding and timeline</i></b>	<b><i>2/14/97</i></b>

# *References*

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- Doyle, M. & Straus, D. (1982). How to make meetings work: the new interaction method. New York: Jove Publications.
- Reddy, W. B. (1994). Intervention skills: process consultation for small groups and teams. San Diego: Pfeiffer & Co.

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