
Effective Meeting Facilitation

Carlton F. “Perk” Clark

Psychotherapy & Organizational Development
350 S Williams Blvd Ste 140 Tucson, AZ 85711
520/519-8475

The basic components of effective meetings

- 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

- 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

- 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

- 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

- 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

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

*The Four Types
of Roles
in an Effective
Meeting*

Meeting Roles for the "Participants"

- 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....

- 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...

- 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...

- 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"

- 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...

- 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"

- 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...

- 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

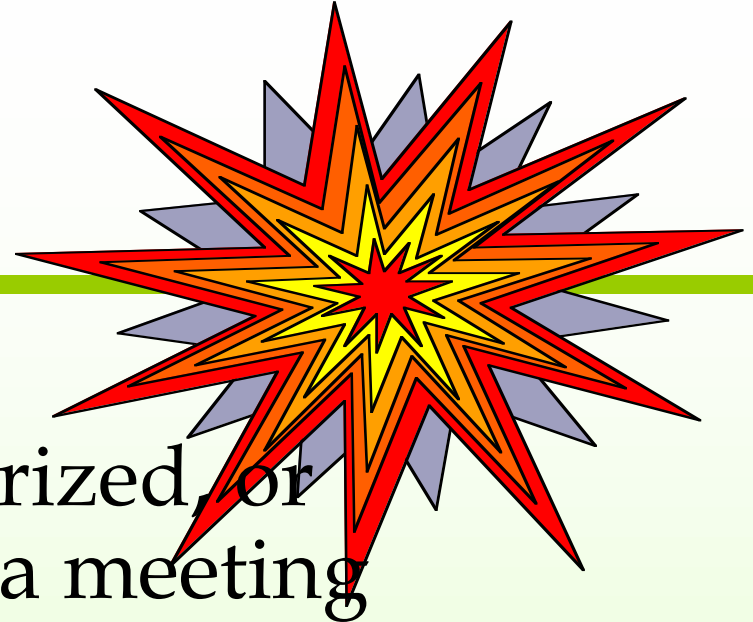
Facilitator...

- 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...

- 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...

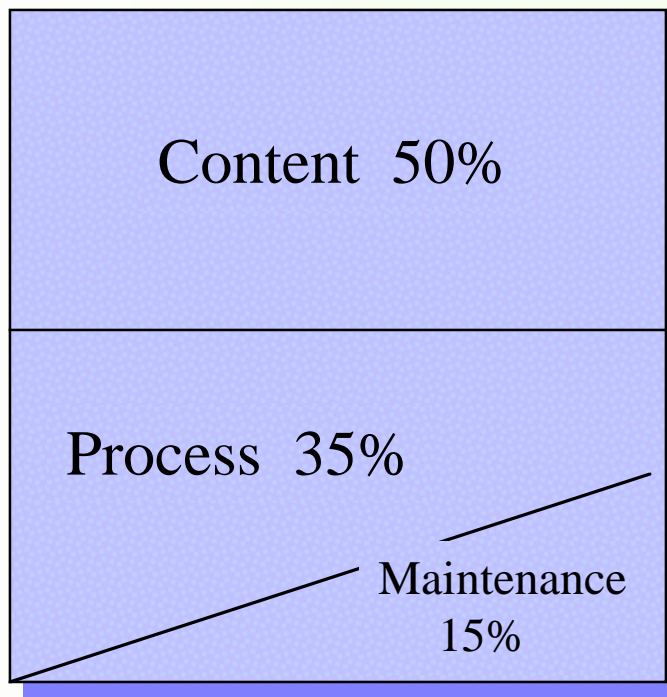


- Step into conflict that becomes too heated, polarized, or begins to be an attack on a meeting member
 - acknowledge the strong emotions
 - offer deferred or immediate methods
 - return the group focus to the meeting method that has been chosen to assist their mutual support of one-another

Facilitator...

- 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?



Content = the discussion elements, topics

Process = how the discussion goes forward

Maintenance = meeting the psycho-social needs

Some common facilitator errors

- 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”

- 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...

- 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...

- 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

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

Action plans

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

Action Plans

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

References

- 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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