Managing Meetings

"One either meets or one works."
-Peter Drucker, The Effective Executive

Introduction

Most aid workers can relate to the sentiment in the above quote. Humanitarian responses are breeding grounds for meetings. Many are needed but many waste time and energy. Considering the volume of meetings required to coordinate, it's easy to think meeting equals coordinating. However, meetings are a tool for coordination. To achieve consistent success with a tool requires knowing how to use it. Achieving consistent success with coordination meetings is no different. Coordinators must manage meetings.

Coordinators should consider a number of general points about meetings:

1. Meetings should be approached as any project: assess the need; design the appropriate response (which may, or may not be a meeting); implement it; follow-up on the results and decisions; and, monitor and evaluate its effectiveness. Meeting objectives frequently are obscure.

2. Making and agreeing an agenda properly can limit repeated weaknesses. This step may even lead to the realization that the meeting is either premature or unnecessary.

3. Many meetings can and should be avoided. Sometimes meetings are a surrogate response to a need best addressed through alternative means. Better information sharing, clearer consultation procedures and methods and more systematic and professional 'networking' (linking-up including electronic and tele-visual methods) can reduce the reliance on meetings.

4. Meetings are expensive: calculate the hourly salaries, benefits and living allowances of everyone in the room for the duration of their travel to, presence at and return from meetings. This does not include the cost of the facilities and the back-up secretariat, security arrangements, etc.

5. Management of meetings requires specialised skills, knowledge and attitudes. Managing them well takes practice.

Organizing Meetings[1]

Meetings are an important coordination tool. They need to be effective. They also need to contribute to good working relationships among working group members. Successful meetings can make working groups stronger (or weaker). Below are some basic steps for meetings management.

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[1] Much information in this section is adapted from Seeds for Change, "Organizing Successful Meetings," www.seedsforchange.org.uk

Before the Meeting

Coordination requires different kinds of meetings: fixed weekly or bi-weekly meetings, emergency meetings, annual planning meetings, information meetings and briefings, etc. Regardless of the type, all meetings benefit from preparation.

The first step is clarifying why your group plans to meet. Know the purpose of your meeting. Confirm it.

Date and Time

Determining the date and time of meetings is rarely a straightforward exercise. Even with fixed meetings this can be complicated, at least initially. Try to find a time that works for the majority, remembering that not accommodating the minority could, over time, lead to losing group members. Varying times makes an important difference in maintaining working group participation.

Venue

Venue makes a difference. Ensure the venue for your meeting is accessible and secure, comfortable and safe. Also make sure participants know how to get there. Choose the right room: consider 4m2 per person, no obstructions, light, ventilation, insulation form noise, adequate toilets and wash-rooms, refreshment facilities, etc.

Planning the Meeting

Draft an agenda. Agendas create structure. Balance speakers, topics and themes. Meetings should have a rhythm and a flow, giving appropriate time to topics while maintaining discipline. Good agendas support this. Give them the time they deserve.

Basic Meeting Types

- Informative:
  - Purpose: To share information
  - Examples: Meeting after a change or a decision

- Operative:
  - Purpose: To take a decision
  - Examples: Meeting to agree on a project or plan

- Creative:
  - Purpose: To share ideas on issue or problem
  - Examples: Meeting to brainstorm or evaluate

- Legal:
  - Purpose: To fulfill a obligatory functions
  - Examples: Meeting as a fixed group or special body

Don't Forget the Invitations

Even regularly scheduled meetings require invitations (or at least reminders), especially if you want to attract new people. And if you're losing people, invitations can help keep people involved. Email makes this easy, though it's not the only way.

When inviting people to a meeting, remember the following:

- ✓ Think about who you will invite and why.
- ✓ Be explicit: Welcome people but explain the purpose of the meeting. Include an agenda. If it's a closed meeting, say so.
- ✓ Include important details: meeting time, date, and venue, relevant contact details for the organizer, relevant documents, etc.
- ✓ Don't be late with meeting invitations. It sends bad signals.

If your meeting requires decision-making processes, coordinators should know in advance their preferred option. The group needs to agree but, especially with big groups or important decisions, the coordinator guides and is responsible for that process.

Coordinators usually chair or facilitate coordination meetings. This is an important role. The facilitator guides the group through the meeting. This requires ensuring the group agrees and sticks to an agenda, decision-making processes and other meeting rules, etc. It requires keeping time and order, and creating a supportive, productive meeting environment.

Managing Your Meeting

There's no one way to manage a meeting but the steps below should help:

How do you begin?

- ✓ Ensure adequate seating, and that participants can see and hear each other
- ✓ Welcome participants and announce the reason for the meeting
- ✓ Invite introductions from all participants
- ✓ Agree ground rules (mobile phones on silent, no side meetings, etc.)
- ✓ Agree the agenda including duration of the meeting
- ✓ Agree relevant procedures such as speaking rights, decision making, etc.
- ✓ Approve minutes from the previous meeting

How do you chair?

- ✓ Manage: Create opportunities, limit domination, digression, disruption
- ✓ Facilitate: Start and end the meeting, encourage discussion, move things along
- ✓ Clarify: Ask questions, restate concepts, ensure understanding
- ✓ Summarize: Condense ideas, provide order
- ✓ Use visuals where appropriate: flipchart, maps, projections, etc.
- ✓ Keep time

> **A good chair knows to do the following:**
>
> - ✓ Listen, Listen, Listen
> - ✓ Remain neutral
> - ✓ And when the chair can't remain neutral…
>   - • He takes off the chair's hat
>   - • He makes clear it's a personal opinion
>   - • She trusts others will express the opinion
>   - • She asks someone to express the opinion

How do you end?

- ✓ Agree action items including timeframe
- ✓ Agree date/time for next meeting
- ✓ Ensure there is a complete participant list
- ✓ Close the meeting on a positive note

Coordinators should encourage all group members to participate in meetings making clear there's no obligation to speak. Group members are obligated to contribute to group products, tasks and exercises, however, and meeting participation can help these efforts succeed. Coordinators should also make sure meeting burdens are shared. Don't rely on the same few people do all the talking.

After the Meeting

Minutes

Minutes are a written account of a meeting. Minutes should document relevant information about the main topics of discussion. They should include decisions and actions.

Minutes are an important record for a working group. Members present at a meeting can review what transpired and members absent can learn what they missed. Minutes can help to maintain progression. It's impossible to be a good chair and a good meeting secretary. Coordinators should identify in advance of a meeting the person responsible for taking minutes. As a bonus, if needed during a meeting, the person taking minutes can assist the facilitator by summarizing discussions.

Sample minutes are provided are annexed. Minutes can be long and detailed but they don't need to be. Essential elements include:

1. Date, time and place of the meeting;

2. People present and absent;
3. Approval of the minutes from the previous meeting;
4. Summary of the issues, discussions and related action items as per the agenda;
5. Details for the next meeting; and,
6. Any attachments such as relevant reports, budgets etc.

Anyone who has chaired meetings knows minutes can be a burden. Don't let them be. For the coordinator and coordination group extremely pressed for time, focus attention on the action items providing key details on discussions that led to them.

Try to circulate draft minutes for review no more than 72 hours after your meeting. This forces coordinator's or support people to articulate in writing meeting discussions and outcomes while they are fresh. It serves as closure for one meeting and one set of issues, naturally inviting the next step.

ABCs of Taking Minutes

Good minutes are:

Accurate. Record proposals and final decisions word for word and read them back to ensure accuracy. Separate fact from opinion. Facts are objective and indisputable; opinions are personal views.
Agreed. Avoid misrepresenting anyone's contribution by asking everyone to agree the minutes. If the minutes are going further afield than those present at the meeting, get agreement before circulating them.
Accessible. Use accessible language: avoid jargon, in jokes and personal shorthand. Is email OK for everyone? If not use post and phone as well. Will everyone be able to open an electronic document in the format you usually use? Do you need large print copies for visually impaired participants?
Allocated. Make sure action points have a who and a by when element to them. If they lack either you may need to approach people and clarify the action point. If someone was volunteered to do a task in their absence, check with them before they read it in the minutes! If they can't do it, find someone who can.

Brief. Brief but informative.

Clear. Write the minutes so that someone who wasn't at the meeting would be able to understand them. That way they'll be clear and comprehensible.
Complete. Ensure any documents mentioned are either attached or referenced, so people can find them (e.g. provide links to a website).
Circulated. The job doesn't stop with typing them up!

From Seeds for Change Short Guide, "Taking Minutes at Meetings," www.seedsforchange.org.uk.

Some working groups may feel meeting minutes are sensitive or that some discussions should stay within the group. The group should agree in advance preferred privacy levels for circulation and storage. Groups should also agree on the level of detail to provide. Groups may find drafting detailed, internal minutes to complement brief, external minutes is a good option.

Coordinators should make sure minutes are filed but accessible. These are group records, after all.

Evaluate Your Meetings

It's worth taking the time to occasionally evaluate your meetings. There's always room for improvement.

Coordinators can evaluate informally at the end of meetings through brief group discussions or create simple surveys or assessment forms. There's no need to make it complicated.

Co-facilitators or a group of meeting organizers can also sit to reflect for a few minutes on aspects of meetings that worked well and opportunities to strengthen approaches. They can apply the same types of written assessments if they prefer.

Decision-Making[2]

If a coordinator brings the working group together to take a decision, or the working group needs to take a decision during a regularly scheduled meeting, she should reflect on the best decision-making method to use and agree on it with participants. Not all methods serve all purposes so coordinators need to know the common decision-making methods and when and how to use them. With the right method, decision-making can be constructive in many ways.

When approaching decision-making, coordinators should ask the following questions:

1. Are we actually making a decision?
2. What levels of ownership to decision-makers have over the outcome? Will they be "informed" of the outcome or have a responsibility for it?
3. How important is the decision?
4. What's the best decision-making method to use?

There are five common decision-making methods:

1. Majority Voting
2. Compromise
3. Delegated decisions
4. Multi-voting
5. Consensus-Building

Each is described in the detail below:

1. Majority Voting: This method selects the alternative garnering more than half the votes.

   ✓ Uses: When there are clear choices, and where group decisions are acceptable. Limit to less important domains.
   ✓ Pros: Fast and clear decisions.
   ✓ Cons: Can be divisive (creates winners and losers). Participants can experience a show of hands as a pressured vote. Groupthink.

2. Compromise: This method provides settlement through the reciprocal modification of conflicting or opposing claims, principles, etc., to reach an agreement.

   ✓ Use: When collaboration is not possible, or in situations when solutions are clear but members divided
   ✓ Pros: Generates discussions and creates solutions. Well know and culturally acceptable.
   ✓ Cons: Splitting the difference/no winners. Can damage relationships and divide parties.

3. Delegated Decisions: Here decision-making authority is delegated to an individual or sub-group and the whole group accepts their decision.

   ✓ Use: When the individual or sub-group are competent and have the necessary position, skills, criteria and information to make the decision, or when the individual or sub-group have more accurate information.
   ✓ Pros: Saves time, the whole group does not have to spend time on reaching consensus.

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[2] Material adapted from UNHCR Global Learning Center, "Coordination Skills Workshop."

✓ Cons: If the risks are not assessed properly, or the information flows inadequate to serve the purpose, decisions may not be appropriate.

4. Multi-voting: Groups use multi-voting to reduce a long list of points or issues to a shorter, manageable amount through a series of votes. This results in a narrow list of important items.

   ✓ Uses: Used when there are several alternatives, or when criteria exist or can be applied against a variety of options.
   ✓ Pros: Systematic and objective, participative and democratic. This is a fast way to sort out complex ideas.
   ✓ Cons: Optimal solutions don't always emerge as votes are split. Groupthink.

5. Consensus: The method seeks an acceptable resolution, requiring that no members block a decision but not requiring that all support it. Consensus is neither a compromise among voters nor unanimous decision by them.

   ✓ Uses: When a group commitment is needed, or decisions are important.
   ✓ Pros: Collaborative, participative, objective and facilitative of ownership.
   ✓ Cons: Time consuming. Requires trust and openness. Must be fact driven.

Conclusion

Meetings are a constant and necessary element of a coordinators professional life. While meetings and coordination are not synonymous, meetings can be an important coordination tool. Coordinators need to know how to manage them, in particular when they involve decision-making. Selected resources and annexes, taken together with the material above, should help them do this.

Resources

Forsyth, Patrick, *Making Meetings Work*, Chartered Institute of Personnel and Development, 1996.
Seeds for Change, Meetings Reference Materials.