Chapter 8
Effective Meetings

Key Points

★ Reasons for Holding a Meeting
★ Pre-Meeting Considerations
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★ Conducting a Meeting
  • Ground Rules • Role of the Chairperson • Role of the Participant • Consensus Decision Making • Parliamentary Procedure • Handling Challenging Situations • Groupthink
★ Executive or Closed Session
★ Components of Meeting Minutes
★ Evaluating a Meeting
★ Concluding a Meeting
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Mentoring Opportunity

★ Learning Assessment

Download the Chapter 8 Tables and Learning Assessment online at www.ajj.com/mentoring — Use password MTS2E989
Have you ever participated in a truly effective meeting? If so, why was it effective? Many people cannot describe an effective meeting because they have never attended one. Meetings have gained a less than positive reputation because often times they are seen as a waste of time, and participants do not see outcomes from the meetings to justify the time spent. As Milton Berle once said, “A committee is a group that keeps minutes and wastes hours.” Meetings have had their share of jokes also. In spite of all the negative things we say about meetings, they are essential to what we do and they can be very positive and effective.

As a new board member, you will have numerous opportunities to participate in a wide array of meetings. In addition to board meetings, you will most likely participate in task forces, committee meetings, problem solving meetings, and planning meetings, to name a few. Meetings can be very productive and time efficient, if everyone who participates is committed to their success. The purpose of this chapter is to discuss ways to plan, conduct, and participate in effective meetings. The chapter is written generically to describe all types of meetings, in addition to board meetings. Specific information about board meetings will be interspersed throughout the chapter. The information will be helpful to you as you plan to participate in a board meeting and will serve as a valuable resource when you are asked to chair a meeting or coach others in chairing their meetings.

As a board member, you are looked upon as a role model. When it comes to leading and participating in meetings, members and other individuals expect you to be knowledgeable and skilled. While the information in this chapter is simple, it is amazing how many people do not know these simple things or perhaps do not realize their importance. Using the information in this chapter will provide you with the essentials you will need to participate in and conduct meetings.

**Reasons for Holding a Meeting**

Meetings are important if they are called to accomplish a specific purpose. Some reasons for meetings include:

- Conducting business that cannot be conducted effectively by other means such as a board meeting
- Information sharing, such as a meeting of the membership
• Solving a problem or decision making, such as determining how to solve a problem that affects the entire membership
• Planning, such as a strategic planning meeting or planning an education program
• Gathering feedback to solicit opinions and ideas about programs and services, such as a focus group meeting

Before deciding to have a meeting, it is important to ask the following questions:
• Is a meeting necessary?
• What is the outcome we need to achieve?
• Is a meeting the best way to achieve the outcome?
• Are there other ways to achieve the outcome such as by phone (conference call), written means, electronic mail, or a virtual meeting via the Internet?

Answering the above questions will help to determine if a meeting is necessary. If so, planning for the meeting needs to begin as soon as possible. Planning is one of the essential keys to an effective meeting. Time invested in advance of the meeting will save time during the meeting and help to assure the meeting’s productivity.

Meeting participants feel meetings are effective when (a) they start and end on time, (b) the time is well spent, (c) there is an equal opportunity for everyone to participate, and (d) they are productive, progress is made, and the outcome is achieved.

**Pre-Meeting Considerations**

**Meeting Purpose**

Some meetings such as board meetings are considered standing meetings. The purpose is clear and the meeting occurs regularly. For other types of meetings, one of the first considerations in planning them is to determine the purpose for the meeting. The purpose will help to decide who needs to participate in it.

**Agenda**

An agenda is an essential element of a meeting. It serves as a plan or blueprint for the meeting. The quality of the items placed on the agenda will determine whether or not the meeting will be productive, meaningful, and meet the intended outcomes.
Participants will work on what is in front of them; therefore, the agenda items must be important, meaningful, mission and strategic plan-driven, and within the group’s authority to handle.

The agenda is jointly developed between the chairperson and the participants. The chairperson should ask participants for their contributions to the agenda and the participants should also feel free to add items to it. The agendas for board meetings are often jointly developed among the board chairperson, staff executive, and board members. Most boards have a standard format for submitting board reports and for submitting agenda items.

An agenda can take any format and contain any information that is necessary for the meeting. Some agendas are very traditional such as the sample board meeting agenda included in Table 8-1. Committee agendas, for example, may be structured according to the strategies or action steps that the committee is working on. Some boards structure their agendas according to the goals of the strategic plan. Others plan the agenda so that all decision items are placed first on the agenda followed by those items requiring only discussion.

### Table 8-1
Sample Board Meeting Agenda

**Professional Association, Inc.**

**BOARD MEETING AGENDA**

February 21, 20xx

Tampa, FL

| I. Call to Order and Introductions - President (10 minutes) |
| II. Appointment of Timekeeper - President (1 minute) |
| III. Business |
| | A. (topic, person presenting, and timeframe) |
| | B. |
| IV. Consent Agenda - ALL (15 minutes for questions/comments) |
| | A. Committee/Task Force Reports (list of reports) |
| | B. Approval of Minutes |
| V. Meeting Evaluation |
| VI. Announcements |
| VII. Next Meeting - Date, Time, Place |
| VIII. Adjournment |

**Source:** Adapted from Nowicki, 1998.
Agenda items of critical importance should be placed at the beginning of the agenda so there is adequate time devoted to these items. Like-items should be grouped together on the agenda. Housekeeping items and minutiae or operational details, if necessary, should be placed at the end of the agenda. Those items that are anticipated to generate much discussion and/or emotion should be separated by lesser-fueled items. It is also a good idea to schedule those items after breaks so participants are refreshed. Speaking of breaks, they should be scheduled throughout an all-day meeting at least every 1-1/2 to 2 hours.

All participants may submit agenda items. It is up to the chairperson to determine if these agenda items will be accepted for a meeting. The decision is often based on the importance or urgency of the item, how it fits with the purpose of the meeting, whether it needs to come to the group for a decision or can be handled in another way, and if there is available time on the agenda. For many boards, supporting documentation is often required when submitting an agenda item. This information provides a background of the item, the time needed, whether it requires a decision or discussion, the recommendation, rationale, and any fiscal implications. Refer to Table 8-2 for an example of an agenda item form (next page).

An agenda should be sent to participants before the meeting if possible. This identifies the meeting as important and worthy of advanced planning. It is a reminder of the meeting and allows members to incorporate the meeting into their schedules. An agenda also helps to remind participants of what will be discussed at the meeting.

“The decision to place an item on the agenda is often based on the importance or urgency of the item, how it fits with the purpose of the meeting, whether it needs to come to the group for a decision or can be handled in another way, and if there is available time on the agenda.”
Table 8-2
Sample Agenda Item Form

<table>
<thead>
<tr>
<th>Professional Association, Inc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>AGENDA ITEM FORM</td>
</tr>
</tbody>
</table>

NAME OF AGENDA ITEM:

DATE SUBMITTED:

SUBMITTED BY:

DESired ACTION:
[  ] Approval [  ] Information/Discussion

ESTIMATED TIME NEEDED:

INTRODUCTION:

RECOMMENDATION (include financial implications if applicable):

RATIONALE:
Many boards send out a packet or notebook of information that accompanies the agenda. This is referred to as the board packet or board book. It often contains the agenda, the previous meeting’s minutes, committee, task force, and staff reports, supporting documents/proposals for business items, and other background information on issues to be discussed at the meeting. While a well-planned agenda is essential, the success of a meeting depends on the participants having the information in advance, and their commitment to reading it in preparation for the meeting.

The lack of planning for a meeting is the major cause of wasted time. The difference between a good meeting and a poor meeting is often determined by how the meeting time is used. An agenda is essential for keeping the meeting focused and on track. The quality of the meeting process and the dynamics that occur are the responsibility of the chairperson and the participants. They share the responsibility of making the meeting a success.

Consent Agenda

The action part of a meeting is the real reason for the participants to come together, not simply to report what could be read at leisure. Standing items such as committee and staff reports and other background information should become part of a consent agenda. The items listed within the consent agenda should be read by the participants prior to the meeting. Participants are expected to come to the meeting prepared with their thoughts and questions to deal with those items, if necessary.

When the chairperson presents the consent agenda, participants are asked if they have any questions or comments regarding the items within the consent agenda. Discussion ensues, if necessary, usually for an agreed upon time period. This part of the agenda is called “consent” because the participants consent to accept the items contained within it. If there are any components of the consent agenda that require additional action or approval, those items should be pulled out of the consent agenda and placed under the “business” section of the agenda. The consent agenda is a time-saving tool because it saves the board from having to discuss and vote on/approve each item or report separately. It frees members to focus on major issues.
Participant Selection

- How many? Choose the smallest number of participants and only those individuals who have the appropriate knowledge to contribute to the meeting.
- Who? Select those individuals who (1) have the authority to make decisions, (2) will carry out the decisions, and (3) have information to contribute to the decision making process. If the purpose of the meeting is information sharing, invite only those individuals who need to learn about the information.

Choosing a Meeting Time

The first consideration in determining a meeting time is the amount of preparation that must be done prior to the meeting. Then it is important to choose a time when the meeting participants will be available. If a meeting space is needed, this will also need to be considered in choosing the time.

In this day of time poverty, selecting a date and time for a meeting is no easy task. It is best to select a few dates and times and circulate them to the invited meeting participants to determine availability. Be creative! A meeting can be held at any time that is convenient or selected by the participants. Scheduling the first meeting for a group should usually be limited to one hour. If subsequent meetings are necessary, the group can decide how much time to allow. Different types of meetings require different time frames.

Arranging a Meeting Site

The choice of a meeting room depends on group size and the room set-up that is needed. The room should be arranged to accomplish the type of meeting that is being held. For example, if the meeting will involve discussion and decision making, the room should be set up so people will face each other. A round, rectangular, or U-shaped set-up works best.

A room should be chosen in which participants will feel comfortable and at ease. Other considerations include a place that is convenient and accessible to participants, and one that is well-lit and well-ventilated. If refreshments or audiovisual equipment are needed, space must be available to accommodate them.
Electronic Meetings

Given the various types of technology available, meetings will continue to take on new looks and formats in addition to the onsite venues. Conference calls or teleconferences, video conferences, and Internet-based meetings help us communicate information in a timely fashion instead of or in addition to face-to-face meetings. As with any meeting, order and productivity are important. Tips for getting the most out of a conference call are found in Table 8-3.

<table>
<thead>
<tr>
<th>Table 8-3</th>
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</thead>
<tbody>
<tr>
<td>Conference Call Tips</td>
</tr>
<tr>
<td>1. Decide in advance the purpose of the call. Is it informational, decision making, reporting, or other?</td>
</tr>
<tr>
<td>2. Determine who needs to be present on the call. Is a quorum needed for a vote? Check the bylaws. Does the staff executive need to be present?</td>
</tr>
<tr>
<td>3. Schedule the call. Keep in mind the time zones of the participants. Ask participants for their preferred times and dates. When scheduling the call with participants, notify them of the method to access the conference call. Conference calls should rarely be scheduled for more than one hour.</td>
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<tr>
<td>4. Make sure everyone knows the purpose of the call and what they need to do to prepare for it.</td>
</tr>
<tr>
<td>5. Have an agenda and stick to it. If possible, draft an agenda and send it to everyone for further input prior to the call. Then form the final agenda and send it to the participants along with the supporting materials. The agenda, if followed, will keep the meeting on track. When the agenda includes multiple items, time frames should be assigned to each item. During the call, a timekeeper may be appointed to keep the group on track.</td>
</tr>
<tr>
<td>6. Assign someone to record minutes. If business is conducted on the call, minutes should be taken. Taping the meeting is rather questionable due to the laws of various states regarding taping phone calls. It might be better not to tape conference calls.</td>
</tr>
<tr>
<td>7. Speaker and cellular phones. Confidentiality may be questionable when a participant uses a speaker phone. The meeting participants need to keep this in mind when determining the purpose of the call and the agenda items. Also, when speaker phones are used, the participant should state to the group if there are other persons participating on the call such as a secretary. Attendance by these individuals should be recorded in the minutes.</td>
</tr>
<tr>
<td>8. When participants speak, they should first state their name so everyone is clear who is speaking. Once all participants are familiar with each others’ voices, this may not be necessary.</td>
</tr>
<tr>
<td>9. Since time is dollars, participants should state their issues and opinions as concisely as possible and limit interactions only to the matter at hand. The conference call is not the place to get side-tracked on irrelevant issues.</td>
</tr>
</tbody>
</table>

Source: Lockwood, 1996.
Standing Meetings

If the group plans to meet on a regular basis, it is a good idea to determine a regular day and time so participants can schedule other activities around this time. Some groups develop a meeting schedule for the year.

There are a couple of things to keep in mind with standing meetings. Just because a meeting is scheduled does not mean it has to occur. Some boards that meet monthly may run into this situation. All standing meetings need to be questioned each time they are planned. Is the meeting really necessary? Is there a purpose for it? Are there enough agenda items to constitute a meeting or can the items be handled in another way or during a subsequent meeting?

When standing meetings are scheduled for a specific time frame, the work/agenda usually expands to fill up the time allowed. For example, if a meeting is routinely scheduled for one hour and the business actually takes only 15 minutes, the group usually finds things to talk about to take up the entire hour. Sometimes this may be good, but usually it is just filler information and not really necessary. When participants look back on the meeting, they usually do not feel their time was well spent. Some participate only because they feel compelled and do not want to seem rude by excusing themselves from the remainder of the meeting.

Conducting a Meeting

Ground Rules

It is helpful to establish ground rules for conducting and participating in meetings. These rules will help to keep the meeting on track, provide order, and help the board arrive at good decisions. Table 8-4 includes a list of ground rules for effective meeting behavior (next page).
Role of the Chairperson

Good meetings rarely just happen. They require thoughtful planning along with appropriate information and leadership. The leader of the meeting, or chairperson, is responsible for prior coordination of the meeting as well as facilitating the process and content during the meeting. The chairperson makes sure the important information (content) is discussed and action is taken. But that is only half the role. The chairperson also handles the way participants work together to meet the goals of the meeting (process). It is important for the chairperson to keep the meeting moving along and to provide opportunities for everyone to participate.

A good meeting involves everyone. The chairperson’s role is to facilitate discussion, not to do all the talking and dominate the meeting. Often, the chairperson remains neutral on the topics that are discussed. Remaining neutral helps the chair to be objective and concentrate on the process of facilitating the discussion. In the best of meetings, everyone participates, no one monopolizes, and everybody is somebody. Table 8-5 provides tips to help the chairperson lead a meeting.

Table 8-4
Meeting Ground Rules

- Be prepared and complete assignments for meetings.
- Start and end the meeting on time.
- Stay focused and adhere to the agenda and time allocations.
- Listen attentively and ask questions.
- Be open minded and visionary.
- Avoid side conversations.
- Actively participate in discussions, but avoid monopolizing them.
- Only one person speaks at a time, and that person will be recognized to speak by the chairperson.
- Place all issues on the table, not under it.
- Decisions will be made by consensus and they will be based on the best interests of the members and the association.
- Committee/board business stays in the meeting room. Avoid carrying on the meeting in the hallway, lounge, or restroom where all participants may not be present.
- Support decisions made, especially when you leave the boardroom.
- Outside of the meeting, present a positive image of the group and its work.
- Take notes on decisions made so you can verify the information in the minutes when you are asked to approve them. Also, your notes will remind you of your assignments.
- Turn off all electronic devices prior to and during the meeting.
At one time or another, most of us will have the opportunity to lead a meeting. When the challenge comes, the following tips will help in conducting a successful meeting. These tips assume all of the preparation for the meeting has been completed.

- Arrive early to the meeting. If the meeting occurs on site, check the room arrangement and room temperature. Pass out any written materials. Greet participants when they arrive.
- Begin the meeting with an introduction of all participants and tell everyone why they are part of this meeting. Explain the importance of everyone’s roles to the success of the meeting. Thank them for their time and expertise.
- Ensure that a quorum is present, if required. If a quorum is not present, the meeting may continue, but decisions cannot be made.
- Respect all participants.
- Create win-win situations.
- Trust that people will come up with good ideas.
- Allow differences to be aired. Let all opinions be expressed.
- Don’t hesitate to use your power to keep the meeting moving. Participants expect this of the chairperson.
- Try to see others’ points of view with an open mind.
- Move the meeting along with well-timed summaries about what has been discussed and decided.
- Before moving on to the next agenda item, make sure everyone understands the action taken on the current item and any related follow-up that is needed. Follow-up assignments should state who will do the follow-up and by when.
- Be confident. This may be your first time chairing a meeting, but no one will know that unless you tell them or act nervous! Pretend you are a pro.
- Concentrate all of the time. It is your job to know what is going on.
- Use and encourage humor.
- Encourage discussion and analysis of problems. Do not rush into solutions before the problem has been well defined and analyzed.
- Seek consensus on decisions. Get everyone’s opinion on important matters. Do not interpret silence as agreement. Ask to be sure.
- Prevent the meeting from turning into a gripe session. Restrict comments to behaviors that can be changed or situations within the group’s control.
- Never make participants feel threatened.
- If a guest is invited to the meeting, prepare him/her in advance. Inform the guest about the group and the purpose of the invitation. Be clear of the time allotted on the agenda and for how much of the meeting the guest may attend. Some informal time may be scheduled outside of the meeting for other participants to talk with the guest.

Source: Adapted from Nowicki, 1998.
Role of the Participant

Meetings are the ultimate team sport, and winning requires more than a good quarterback. Too often we will leave a meeting and say, “That was a waste of my time” or “We did not accomplish anything.” It is easy to blame an unproductive meeting on someone else, however a successful meeting is the responsibility of all the team players.

One of the most important responsibilities of a participant is to come prepared for the meeting. Reading materials prior to the meeting is essential. If you are responsible for an agenda item, come prepared to share highlights of your item, not to present it or, worse yet, read it. Participants should have done their homework in reading the information you prepared for them. The meeting time for your agenda item can focus on discussion, problem solving, and decision making (Nadler et al, 2006).

Tips for being an effective meeting participant are found in Table 8-6 (next page).
Table 8-6  
Tips for Meeting Participants

- Prepare for the meeting. Review the agenda and read any other information distributed before the meeting. Jot down questions or points for clarification. If you have placed an item on the agenda, be well prepared with enough facts and information to present and discuss the item.

- Consider it a compliment when you are asked to participate in a meeting. You and your position/expertise are important.

- Use the meeting as an opportunity to develop your image and interpersonal skills.

- Arrive on time.

- Listen. Active listening involves an open posture, eye contact, and facial expressions that show interest.

- Know what you are talking about when you speak.

- Treat others fairly during the discussion.

- Stick to the matter at hand — the agenda. Help the chairperson keep the meeting on track.

- Be a part of the solution, not the problem.

- Express your opinion on issues raised for discussion.

- Take notes. Your memory may not be up to par after the meeting.

- Ask relevant questions.

- Ask for clarification or an explanation if you do not understand.

- Tell yourself you are going to get at least one good idea from the meeting. You will spend your time listening for that idea.

- Avoid disruptive behavior. Evaluate your meeting behavior. Are you one of the causes of “challenging situations?”

- Avoid side conversations.

- Avoid bringing hidden agendas to the meeting. If you have something to say, put it on the agenda.

- Support the decisions of the group, especially outside of the meeting room.

- Participate in establishing ground rules for meeting behavior, then do your part in adhering to them. Tactfully confront your fellow participants who may violate the ground rules.

- Participate in evaluating the meeting by identifying the meeting’s strengths and also providing suggestions for improvements.

- After the meeting, follow up on your assignments and report back.

**Source:** Adapted from Nowicki, 1998.
Consensus Decision Making

Decisions made in meetings should be given careful consideration before conclusions are reached. In most meetings today, voting has gone by the wayside. Instead, decisions are reached by consensus. Unfortunately, while people know the word, not everyone understands what consensus means.

Consensus decision making involves all meeting participants contributing their opinions and ideas, discussing situations and alternatives, and determining a solution and plan of action that everyone can support. During the process of coming to consensus, the chairperson will summarize the trend of the discussion at intervals to see how much agreement is surfacing with the group. Once the group arrives at a decision, it is important to ask if there is any hesitation to accept the decision. If someone is unable to accept the decision, further discussion needs to occur. That person should be asked to provide other alternatives, which are then discussed, and jointly the group arrives at a decision that is acceptable to everyone.

Consensus is a process that creates win/win situations. The solutions do not compromise any strong convictions or values of those involved. Consensus is not compromise. No one should have to give up something to gain something in return. While all participants may not agree totally with the decision, or they may not think it is the ideal solution, everyone is willing to give it a try and they agree to support it. This means when participants leave the meeting, they do not sabotage the decision.

If consensus cannot be reached, at least the group has given it their best effort. The issue may need to be tabled until another time when more information or other alternatives are available. The experience of consensus building can be a powerful way for individuals to learn how to work thoroughly through situations and explore alternatives. It is much different from voting. With voting, usually some win and some lose. With consensus, no one must lose in order for someone else to win. The interaction is collaborative. When individuals experience success with consensus building, they feel good about the process because they know they have been heard, their ideas have been given a chance, and all options are considered.

Can voting and consensus decision making be combined to arrive at a decision? In some cases, voting may be appropriate.
There are times when a board thoroughly discusses an issue and everyone arrives at a consensus decision except one or a few members. These members may be very passionate about the topic at hand and they will never agree to go along with the board’s decision, nor are they likely to offer acceptable alternatives. In these cases where a decision must be reached, the chair may call for a vote. While this may not be the ideal way to make decisions, it may be the best alternative, given the circumstances.

Parliamentary Procedure

Robert’s Rules of Order have for years been the traditional guide used for adhering to parliamentary procedure during board meetings. Given the culture of today, fewer and fewer associations are using Robert’s Rules to guide their actions at board meetings. While they may continue to be used at large business meetings of the associations, only a few boards adhere to the rigidity of these rules at board or committee meetings. Robert’s Rules have a tendency to create confusion and intimidation when trying to use the proper terminology and proper order. The rules tend to stifle the creative and fluid dynamics that are characteristic of the boards of today. Some boards may continue to feel compelled to use the rules because that is the way the meetings have always been conducted. Other boards have done away with the rules except for situations when a vote is required for any issues with a financial impact.

Handling Challenging Situations

Being a chairperson is a very important position. Since the chairperson is responsible for the process of the meeting, the role encompasses dealing with challenging situations that may, and usually do, arise during a meeting. Each meeting has participants who rarely talk and those who will not stop talking. The chairperson’s job is to maintain a balance. Here are some examples of challenging situations and how they can be handled effectively.

The Talkers. Participants who dominate the meeting by talking often have good ideas but go into too much detail and get sidetracked. Or, they have something to say about every topic or issue that is raised. Talkers can actually ruin a meeting.
Techniques to Handle Talkers

- Be subtle at first. Close the topic by saying, “Thank you, I understand.”
- Use direct questions to draw out other people.
- State, “I’d like to hear what others think about...”
- Avoid looking at the talkers when asking a question.
- A private conversation with talkers after the meeting or during break may help.
- If the above fail, tape the meeting and ask the talkers to listen to the tape.

The Neighbors. Participants talking to their neighbors (side conversations) is something that will happen in a typical meeting. Usually these conversations are brief. However, they can become a problem if they happen often or for an extended length of time. They interrupt the meeting and distract other participants.

Techniques to Handle Neighbors

- Invite the neighbors to share with everyone what is being said.
- Politely ask the neighbors to turn their attention to the group’s discussion.
- Stop the group’s discussion and look at the persons talking. The silence will usually end the side conversation.
- Speak to the persons outside the meeting and inform them that the behavior is disruptive.

The Non-Talkers. Quiet individuals may feel intimidated or lack the confidence to speak up during the meeting. They may not think they have ideas that are important to contribute. Often these individuals are introverted and need time to think first about what they are going to say.

Techniques to Handle Non-Talkers

- Encourage the non-talkers to speak. Give them eye contact while asking for a response from the group.
- Ask a question about an area in which the non-talkers are knowledgeable and can speak with confidence. Usually this is an ice breaker.
• During a discussion, ask the non-talkers if they have anything further to contribute. While the response can be a one-word answer, they will at least feel involved in the discussion.
• Use a round robin approach so everyone is encouraged to participate when it is their turn.
• When non-talkers do talk, listen attentively and reinforce the importance of their contribution. Creating a positive experience for them will encourage future contributions.
• Avoid ridiculing the non-talkers for not talking.

The Hecklers. Hecklers disrupt the meeting with snide remarks or simply want to argue. Often, hecklers irritate the group.

Techniques to Handle Hecklers
• Do not argue or reprimand hecklers. Beat them at their own game. Ask for positive suggestions.
• When hecklers speak with an inappropriate remark, ask the group to join in the discussion by stating what they think of the remark.
• If hecklers are insensitive to the problems they are creating, directly point out that the behavior is disrupting the progress of the meeting. Then turn to another person with a question to get the meeting back on track.
• Speak to the hecklers outside the meeting, inform them the behavior is disruptive, and ask for cooperation in eliminating the disruptive behavior.

The Squashers. Squashers say NO to everything. People who are against change or who may be negatively affected by a decision may squash ideas.

Techniques to Handle Squashers
• Rephrase the negative comments in a positive way to help participants define problems.
• Ask the questions, “Do things need to be this way? How can we make them a positive experience?”
• Ask the question, “Does anyone feel differently about this?”
• If you know the squashers will be negative about an issue, talk with them privately before the meeting, ask for their opinions, and allow them to air their views on a one-on-one basis.
The Busybodies. These individuals believe their work is more important than the work of the group. Busybodies often arrive late, leave early, take personal messages or talk on their phones during the meeting, and leave the room for brief periods. This behavior disrupts the group and there could be a delay if the busybodies need a briefing upon return. The continuity of the meeting is broken, participants forget their ideas, and valuable time is wasted.

Techniques to Handle Busybodies
- Establish ground rules to address these behaviors. Confront the busybodies if their behaviors continue and state they are in violation of the ground rules.
- Talk to the busybodies outside of the meeting and inform them that their behaviors are disruptive. Ask for cooperation.

The Experts. These people are usually knowledgeable but do not know when to be quiet and let others contribute their knowledge also. The experts have something to say about everything and eventually other participants stop listening because they have simply heard enough.

Techniques to Handle Experts
- Talk to the experts privately about their behavior and its effects on the other participants. Acknowledge the expertise offered, but state that others need to contribute also. Ask the experts to listen and encourage others to contribute.
- Since the experts can intimidate others in the group, try to ask the experts to serve as resources and ask for their opinions when needed. Also, ask the experts to listen to others’ opinions first, then offer their opinions, if appropriate.
- Ask the experts to be special recorders of certain discussions since their expertise will help to record the important points on this topic.
- Try not to alienate the experts.

The Directors. Directors think that they should be chairing the meeting. Perhaps they have been previous chairpersons of the group or another group and they know everything there is to know about facilitating a meeting. While the directors may be very
knowledgeable of the role, the situation becomes competitive with the current chairperson’s role in the meeting.

Techniques to Handle Directors

- Invite the directors to lead a segment of the meeting, record minutes, or lead a subgroup.
- Talk with the directors privately, acknowledging their expertise in leading a meeting, but state it is not their role in these meetings. Ask for the directors’ cooperation in being effective participants by not competing with you and letting you run the meeting.

The Coroners. There will often be those who leave the meeting and provide others with a devastating postmortem of the meeting. Sometimes participants take turns in playing the role of the coroner. The coroners remember the negative things that happened, even if they were few, and somehow forget about all of the positive things that occurred during the meeting.

Techniques to Handle Coroners

- Establish ground rules that state the business that is discussed at the meeting remains among the participants of the meeting. Also, the image of the group is important to everyone, so all participants are expected to present a positive image of the group and its work. If participants take on the coroner role, they should be confronted about violating these ground rules.
- Avoid getting caught up in the aftermath of the coroner’s ruling!

Handling Other Challenging Situations

No one is talking. Sometimes it is difficult to get a discussion going. For whatever reason, participants are quiet. The chairperson could handle the silence in various ways such as stating:

- “Let’s not all talk at once.” This usually generates some humor and breaks the ice.
- “It is pretty quiet...I am not sure what the silence means...” This is almost always effective in getting participants to respond. Sometimes, they will state that they simply need time to gather their thoughts before they respond. Allow them time to do this.
“What if (suggest an idea) ...., How many of you would agree with that?”
“Who hates the idea?” This gives permission to the group members to dissent, if that is the case.

**Getting Off Track.** There are times when participants are so engaged in a discussion that they steer off track. It is easy for this to occur when a group gets together, especially a group of individuals who knows each other well and has not communicated with each other in a while. The chair must be attentive to these situations and help corral the group back to the relevancies of the agenda item being discussed. This can occur by simply saying, “We are getting off track” or “We have gone over our time allotment for this item and need to move on.” This usually serves as a reality check for participants and they willingly agree.

**Dealing with Deadlock.** Another situation that occurs is an impasse or deadlock. After much discussion, a group simply cannot reach consensus. Suggestions for dealing with this problem include the following:

- Realize that deadlock may be okay, and move on to the next agenda item.
- Ask participants to reverse roles to get a fresh perspective on the situation.
- Discuss the consequences of each position.
- Assist the opposition in determining what needs to happen for them to move ahead with the idea(s) on the table.
- Take a break so people may refocus.
- If the issue remains unresolved, table it for a future discussion.

**Groupthink**

While cohesiveness is necessary for effective group functioning, meeting participants can become too cohesive. Cohesiveness can be carried to an extreme where participants feel pressured to conform to ideas and decisions with which they may not agree. Members may feel that loyalty and approval of other participants are more important than expressing an opinion that is different from the team, or they may think they are off target and are unwilling to express their thoughts. This is called “groupthink.”
It is essential that the information recorded in the minutes be accurate. The minutes need to contain the actions of the meeting, not necessarily the discussions.

avoid groupthink, participants need to state their positions and ask questions when they do not understand or when things just do not seem right. The only dumb question is the one that is not asked. Additional information on groupthink is provided in Chapter 5, Teamwork.

The first line of defense in handling all of the above situations is the chairperson. This person has tremendous responsibility and needs the support of all participants. The chairperson needs the courage and tact to correct, corral, and sometimes ask unruly participants to retire from the group. No group can survive a toxic culture for very long, and good volunteers will not continue to devote their time to an association where the culture is not meaningful and enjoyable.

Executive or Closed Session

Most board meetings are open to any members to attend. However, there are special circumstances when the board determines that the information to be discussed at the meeting is confidential in nature. The board will call an executive or closed session. This session is open only to the individuals that the board deems appropriate. Executive sessions may be held when the board is conducting a performance evaluation, discussing the renewal of a contract, or holding a disciplinary session. Individuals attending an executive session are bound not to discuss or disclose anything that occurred in the session. The minutes of an executive session must be read and acted upon only in executive session.

Components of Meeting Minutes

Minutes are a way of briefly stating in writing the actions that occurred at the meeting. For board meetings, the minutes serve as the legal record of the meeting. Therefore, it is essential that the information recorded in the minutes be accurate. The minutes for each board and each meeting will most likely look different. There are several formats to record minutes. The important thing to remember is the minutes need to contain the actions of the meeting, not necessarily the discussions. It is not important to know who said what and why. The actions or decisions, follow up assignments, and persons responsible are the essentials to be recorded. Generally, minutes should include the information found in Table 8-7.
Effective Meetings

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With most meetings, the minutes are distributed to meeting participants as soon after the meeting as possible. The participants are responsible for reading the minutes and making any corrections. It is best to do this as soon as you receive the minutes while the meeting is still fresh in your mind. At the next meeting, the minutes are not read. The chair will ask if there are any corrections or additions to the minutes. The minutes will be amended as needed or they will “stand as written.” Approval of minutes may also be included in the consent agenda. Another option is to approve the minutes electronically while they are still fresh in everyone’s mind. If minutes are approved outside of the meeting, the next meeting’s minutes need to reflect that the minutes were previously approved.

Evaluating a Meeting

Practice makes perfect—but only if we are practicing the right things. Just because we have attended meetings for years does not necessarily mean we are doing it right! There is always room for improvement; therefore, a group should evaluate its meetings.

Table 8-7
Information to Include in Minutes

1. Name of the group/committee and the kind of meeting (e.g., board, closed session).
2. Date, time, and place of the meeting.
3. Those in attendance, including the chair, secretary, and any guests.
4. Acceptance of previous minutes, if applicable.
5. Agenda items, decisions, follow-up, person(s) assigned, and timeline. Brief points of discussion may be included if they are important to the understanding of the decision. Minutes record what was done, not what was said. They should be factual and not contain personal opinions. Avoid adjectives and adverbs.
6. Titles of the reports provided in the consent agenda, if applicable.
7. For motions, the maker of the motion along with the actual wording of the motion are transcribed.
8. Each agenda item is transcribed separately and numbered for ease in reading and locating the item.
9. The time of adjournment and the recorder’s signature.

Source: Adapted from Nowicki, 1998.
Some groups do a “process check” at the end of their meetings to determine what worked, what did not, and what needs improvement. Other groups may use a written evaluation tool composed of questions such as those in Table 8-8. The tool can be distributed at the end of the meeting and completed individually by each participant. In a round robin fashion, each participant summarizes their evaluation of the meeting by stating the strengths of the meeting and recommendations for enhancing future meeting effectiveness.

### Table 8-8
**Questions for Evaluating Meetings**

- Did the meeting accomplish its purpose?
- What percentage of the meeting focused on strategic direction vs. planning and administrative details?
- Did the meeting begin and end on time?
- Did everyone contribute to forming the agenda?
- Did the agenda clearly define the work to be done?
- Were all the agenda items covered?
- Was the time for the meeting adequate? Was the time well used?
- Were issues discussed thoroughly or were decisions made too quickly?
- Did the chairperson keep the meeting moving along so the agenda items were covered?
- After each agenda item, was there a summary of the action to be taken? If so, did the summary include to whom assignments were given and a deadline?
- Were the location and time convenient?
- Was the room set-up and work space adequate?
- Was the meeting process effective and efficient?
- Did everyone have a voice in decisions made at the meeting?
- Were there members who dominated the discussions?
- Did some members seem quiet and not contribute to discussions?
- Were some members negative? Did they squash ideas?
- Were there side conversations going on?
- Were some members arguing and heckling?
- Were there some members too busy to pay attention to the meeting?
- Were challenging situations handled appropriately?
- Was everyone prepared for the meeting?
- What behaviors facilitated group process?
- What behaviors hindered the group's functioning?

**Now summarize what worked and what didn’t. Develop strategies for improving the next meeting.**

*Source: Adapted from Nowicki, 1998.*
Concluding a Meeting

After all agenda items are discussed, the meeting is summarized. The summary may include the highlights of the meeting and a restating of assignments and deadlines. Minutes should be distributed as soon as possible to refresh everyone’s minds about assignments that were made. As the meeting concludes, the agenda for the next meeting begins to be prepared. Any items that need follow-up should be put on the upcoming agenda.

Successful meetings end on a final note of achievement. Individuals are thanked for their participation and commended for the accomplishments made. It is helpful to talk about where the group began, where it went, and where it finished. Doing so leaves participants with a positive feeling about the meeting and about their roles in the process. Once these notes are made and business is concluded, the meeting is adjourned. Those individuals who would like to talk about other issues may remain. Those who need or want to leave also are free to do so.

Tips for New Board Members

New board members may have attended their association’s board meetings in the past as observers. This is a good opportunity to learn about the culture of these board meetings and the rules to follow. If you have not had that experience, discuss with your mentor or a current board member the culture and the politically correct things to do and those to avoid. Be familiar with the association’s bylaws, minutes of previous meetings, and other documents that pertain to meetings. Do your homework so you can contribute effectively during the meeting. Bring more information than you will need, and use it if necessary.

During your first board meeting, the board will most likely be very cordial and willing to help you understand both the content and the process. Be kind to yourself; it is acceptable to feel a bit anxious and expect to be somewhat overwhelmed. Most board members can remember their first board meetings and how novice they felt. Try to present your best image by being enthusiastic and willing to learn. Pay attention to others when they speak. Show your interest by asking questions to obtain more information and for clarity. Contribute information in a positive manner when you are ready. Find out the dress code for the meeting and dress accordingly. Last, but not least, be yourself. You know you
have something to contribute or you would not be sitting at the board table!

**Summary**

An effective meeting involves planning, both by the chairperson and the participants. New board members must possess or develop effective meeting skills not only for their roles on the executive board, but also for their roles in leading other meetings and groups throughout the organization. Board members are looked upon as role models and are expected to be well-skilled in conducting and participating in meetings. Since most of the board’s work is accomplished through some form of a meeting, it is important to learn and practice effective meeting skills.

Each person who attends a meeting takes back positive or negative reactions from that meeting. An effective meeting can have great benefits. Participants can return home or to their jobs rejuvenated, excited, and motivated. Their good feelings can be contagious if they are spread to others. The opposite can also be true if negative feelings are taken away from the meeting. There will always be portions of the meeting that are very positive, but there will be portions that are frustrating or negative. What we remember about the meeting, whether positive or negative, is our choice.

Good meeting skills can provide participants with positive feelings about the content and process of the meeting and their roles in contributing to a successful meeting. Effective meetings result in improved teamwork, interpersonal relationships, morale, and productivity.

Meeting skills can be learned, and if practiced, can make meetings productive and fun. They can be enhanced by following this chapter’s tips for both the chairperson and participants. Further improvement can occur by evaluating meetings and getting feedback about your own behavior in meetings. Remember, meetings are the ultimate team sport – winning requires the quarterback and all the team players.
Reflect on the knowledge you gained from this chapter by responding to the following statements and questions. Some of the statements suggest topics for you to discuss with your mentor. This chapter may also have prompted other thoughts and questions to discuss with your mentor.

1. What have you learned from this chapter that you plan to use to enhance your skills as a meeting participant?

2. What have you learned from this chapter that you plan to use to enhance your skills in chairing a meeting?

3. After your first board meeting, ask your mentor to give you feedback about your performance at the board meeting. Was the feedback consistent with your self-assessment?
4. Based on your own assessment and feedback from others, what will you do to enhance your meeting skills at future board meetings?

5. After your first board meeting, ask your mentor to evaluate the meeting with you using the Questions for Evaluating Meetings (Table 8-8) found in this chapter. Address what went well, what did not go very well, and what challenging behaviors you witnessed at the meeting. How was the meeting handled by the chairperson and how did the participants contribute to a successful meeting? What needs to improve?