Running Effective Meetings

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Workshop Outline

Objective

- To have effectively run meetings.

Purpose

- To develop new skills or enhance existing ones.

Outcomes for Today

By the end of today, you will have:

- Learned Task, Process & Interpersonal skills that will help you in running &/or participating in effectively run meetings.
- Practiced new skills.

Agenda for Today's Meeting

- Introduction / Expectations – what are you hoping to walk away with from this workshop?
- Overview of skills needed to run effective meetings
- Communication skills
    - what gets in the way of good listening & keys to listening effectively
- Exploring the reasons we react the way we do - positions and interests.
- Interpersonal Skills
    - questioning skills
    - summarizing skills
    - reframing – negative to positive
    - assertive interest-based communication.
- Task & Process Skills
    - Introduction to strategic planning and continuous improvement models.
    - Establishing the meeting's objective, purpose, expected outcomes and agenda. Creating Action Plans.
- Wrap up
    - What is one thing that you've learned today that you want to implement?

Skills for Running Effective Meetings - Summary

- Identifying goal or objective of meeting

- What is the purpose and expected outcome(s)

- Developed step-by-step agenda

- Meeting room arrangements & setup

TASK SKILLS

PROCESS SKILLS

INTERPERSONAL SKILLS

- Situation analysis

- Choosing process (problem solving, decision making, etc.)

- Identifying alternatives

- Decision making

- Staying focused

- Staying relevant

- Create a participative climate

- Active listening

- Supporting

- Being aware of others

- Dealing with differing viewpoints

- Valuing diversity

- Asking open-ended questions

- Summarizing

- Reframing

- Giving feedback

- Managing disruptive group differences

- Encourage participation

What Gets in the Way of Good Listening

Hearing: we may not hear what is being said because of noise, other
                    people's talking, distractions, invasion of our physical space, or
                    because we feel we already know what the person is going to
                    say

Understanding: perception or meanings may be different for different people,
                    especially where value and cultural difference exist or when
                    technical jargon is used.

Believing: meanings can be lost because we don't believe what the other
                    person is saying. We believe they really have other underlying
                    motivations.

Relevance: we may say or think "so what" to what they have to say. We
                    may hear and understand the words but shut them out because
                    they have no relevance to us.

Action-reaction: we may be so preoccupied with, "How should I respond", or
                    "what am I going to say", that we miss some or all of the
                    message.

What gets in the way for you? What are you going to do differently to become a better listener?

Keys to Listening Effectively

➢ With an attitude of curiosity rather than judgement, we can become good listeners.

➢ Listening & understanding a person does not mean agreeing with them.

Guidelines:

➢ Turn off your judge & get curious.

➢ Reduce or eliminate barriers to effective listening.

➢ No problem solving – remember you are exploring at this point, not solving. For example, statements like the following are problem solving oriented statements:

  o "Have you tried ..." or "Have you thought about..."

  o "What are your options / alternatives?"

  o "What would you like to see happen?"

➢ Watch for questions that begin Open-ended and change to Closed questions, such as;

  o What do you mean by (blank)? Is it (A)? Or is it (B)?

  o When can you have the project done? May 1st or June 1st?

When you ask a question that provides options, the person will likely choose one of the options which may or may not be the same answer they would have given if you had only asked an open question.

Interests vs. Positions vs. Issues

Issue

In neutral terms - what is this about? What is the topic?

Position

A strongly held belief, opinion or attitude as to "how it is" or "how it should be."
An expectation that there is only one way, one right outcome, one correct solution.

> "A belief that truth is absolute, and that you are the holder of that truth."
>
> - Danaan Parry

When you hear a "position" (an opinion or solution) such as:

"He is always telling us to act safely and then I see him running down the stairs.
He should "walk the talk" and follow his own orders."

"We have to win the President's Safety Award."

"I want the promotion."

First, hunch for yourself.....

What is important to this person? and,

Why might it be important to him/her?

Second, explore answers to these questions by asking the person open-ended questions.

Interests: How To Identify Them

What are Interests?

The reasons people adopt their position – their needs, wants, concerns, or fears. Interests may be "**hard**" (food, shelter, safety) or "**soft**" (recognition, approval, control). Remember – interests are always positive.

How to Identify Interests:

Uncover "Interests" by listening for words, or asking questions, that identify: *What is Important to other person.*

What are their concerns, hopes, expectations, fears or values.

Some common interests we have are:

acceptance	economic well-being	privacy
accountability	efficiency	recognition
achievement	fairness	relaxation
acknowledgement	freedom from fear	respect
affection	fulfillment	responsibility
appreciation	fun	safety
autonomy	independence	satisfaction
clarity	knowledge	security
commitment	opportunity for input	self-fulfillment
competency	order	trust
consistency	predictability	understanding
control over one's life		validation

Maslow's Hierarchy of Needs

Self-actualization

personal growth
& fulfillment

Esteem needs

achievement, recognition,
responsibility, reputation.

Social needs

family, friendship, belonging,
being accepted

Safety needs

protection, security, order, law, limits, stability, etc.

Biological and Physiological needs

basic life needs – air, food, drink, shelter, warmth, sex, sleep, etc.

ISSUES
(areas of
conflict)

POSITIONS
(Opinions/Solutions
that meet my needs)
↓

POSITIONS
(Opinions/Solutions
that meet my needs)
↓

INTERESTS

Basic human needs for safety,
security, social, self-fulfillment,
control over one's life,
recognition, etc.

INTERESTS

Basic human needs for safety,
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*Interests
In Common*

Unique Interests

Unique Interests

To better understand their "Position",

uncover their "Interests"

(what's important to them & reasons it is important)

ask <u>Open-Ended Questions</u> &

prove you heard them by <u>Summarizing</u>

Open-Ended Questions

The purpose of the questioning process is to explore and clarify the issue being discussed, promote discussion or reflection, or to stimulate thinking in a new direction.

➤ **To clarify**: terms, concepts, experiences which may be ambiguous (i.e., "What do you mean when you say 'she's not supportive'"?).

➤ **To describe**: in a more specific way (i.e., "What was your experience of that meeting?" or "What did he say when ....")

➤ **To expand**: reflect more deeply, give more information (i.e., "Could you say more about why that bothers you") - use to draw out contributions, or when you are sensing resistance.

➤ **To focus**: on a particular topic or aspect (i.e., "What is it about his work that you find unsatisfactory?" or, "What specifically is it about (blank) that you don't like?")

➤ **To challenge**: participant's way of thinking (i.e., "Earlier I heard you say ..., now you are saying..." "What do you think is likely to happen if you just continue refusing to pay?" or "What might be another way of looking at it?")

Examples:

What do you mean by...?

Please elaborate...?

What exactly is...?

What else concerns you about...?

Tell me more about ...?

Other open-ended questions start with "*Where*", "*When*", and "*Who*".

However, questions that begin with "What" and "How" will elicit more information.

CAUTION about using "*Why*" questions as they come across as challenging to the other person. Only use "why" questions if you are curious and sound that way.

Summarizing

Purpose of summarizing is to stop the development of information periodically and sum up the information (key points) you have understood up to that point. This helps in two ways:

1. It forces you to restate what you have understood

2. It verifies if you have understood correctly and, if not, corrects or adds to your understanding.

It also helps you keep in mind the <u>key facts</u>, and it ensures that the conversation progresses with mutual understanding.

<u>Summarizing can also be helpful to:</u>

➢ Show you were listening to what other person had to say
➢ Identify issues in opening stories/statements
➢ Capture key interests
➢ Clarify a participant's point of view
➢ Highlight areas of commonality between the participant's statements
➢ Provide closure to a discussion
➢ Focus discussion on a particular point
➢ Mark progress or new levels of understanding
➢ Emphasize conciliatory gestures or comments that were lost in an exchange

Most importantly, the individual feels "listened to".

<u>Examples:</u>

It sounds like...

What you have said so far is ...

What I have heard so far is...

Let me see if I have this right so far, you have said...

Reframing – from Negative to Positive Orientation

When often speak in negative terms:

- What I do *not* like
  - What I do *not* want
    - What I will *not* do

} Usually positional

What is important to you is hidden/obscure

INSTEAD OF:

- What I do like
  - What I do want
    - What I will do

} Interest-based and positive
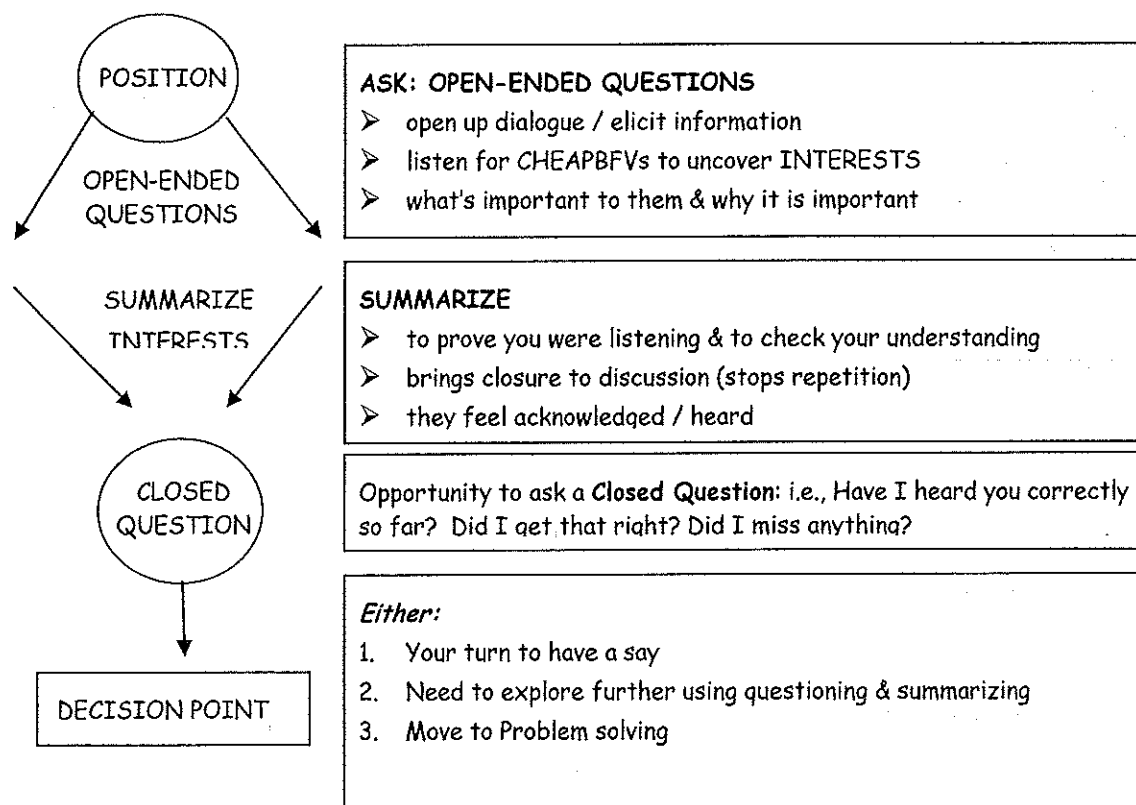
What is important to you is clear

For example,

NEGATIVE OUTLOOK Positional	POSITIVE OUTLOOK Interest-Based
Don't run!	Walk! Please walk in the mill.
(When asked, "how are you doing?") "Not bad."	("How are you doing?") "Good."
I got 4 answers wrong.	I got 6 answers right.
One of the things that I find annoying about this project is that I am never sure who is responsible for what.	It is important to me to know who is responsible for each aspect of this project.
I'm tired of being asked to do the impossible. Every company I've worked for expects a first class job in half the normal amount of time.	I need a realistic time frame in order to do a first class job (map out details)

Exploring Interests - Listening Exercise

Person A   - State strongly held opinion/view in a <u>one</u> <u>sentence</u> <u>statement</u>.

Person B   - Using listening skills, find out what Person A's interests are and
                summarize them.

Person C   - Be prepared to give Person B feedback.

Rotate roles - Either continue with same subject <u>or</u> start a new topic.

<u>Remember</u>

- No problem solving – you are exploring at this point, not solving.

POSITION

OPEN-ENDED
QUESTIONS

SUMMARIZE
INTERESTS

CLOSED
QUESTION

DECISION POINT

ASK: OPEN-ENDED QUESTIONS
- ➤ open up dialogue / elicit information
- ➤ listen for CHEAPBFVs to uncover INTERESTS
- ➤ what's important to them & why it is important

SUMMARIZE
- ➤ to prove you were listening & to check your understanding
- ➤ brings closure to discussion (stops repetition)
- ➤ they feel acknowledged / heard

Opportunity to ask a **Closed Question**: i.e., Have I heard you correctly so far? Did I get that right? Did I miss anything?

Either:
1. Your turn to have a say
2. Need to explore further using questioning & summarizing
3. Move to Problem solving

Basic Problem-Solving Process

When confronted with a "problem", most of us feel an overwhelming urge to "solve it" or "fix it" as quickly as possible. Unfortunately, people often become wedded to their particular solution and argument or debate takes the place of real listening and creative discussion.

The following process is intended to slow down the problem-solving process by taking time to define the problem, explore what elements a successful solution must contain, and then consider as wide a variety of options as possible. In the long run, this approach is more efficient, creates more creative and fulfilling solutions, and results in agreements which will have higher level of buy-in that traditional "compromises" or divided votes.

1. Determine the issue or topic:

In <u>neutral</u> terms, what is it we need to discuss and resolve? Rather than "I want to go to Hawaii for our vacation" clarify that "we need to discuss where to go on our holiday". This reduces people's tendency to "dig in" over one particular solution and invites open discussion and flexibility.

2. Explore interests and needs:

Ask yourself "what's important to me about this, and why" - assert your interests, needs, values, and concerns rather than arguing your position.

Ask others what they see as the ingredients of a "successful solution" for them. If someone presents a "solution" (position) probe to find out what they see that option achieving. What is it about that option that appeals to them?

3. Generate and evaluate options:

Consider various options to meet the interests and needs expressed in step 2. Avoid jumping to the first solution that comes to mind and avoid engaging in a power struggle over two (opposing) positions. Measure the options against your definition of "success" in step 2.

When you reach a decision, clarify the details - who will do what by when - and ensure follow-up.

Assertive Interest-Based Communication

Just to clarify,

Assertiveness	-	cares about self and others' needs.
	-	speaks for oneself.
Aggressiveness	-	cares only about own needs.
Passiveness	-	care only about others' needs.

"I" Messages

When speaking about *your* own perspective, opinion, thoughts, feelings, expectations, hopes, needs, etc. – use "I" messages.
("I thought we had agreed to...." or "I am frustrated with ....." or "I think...")

"I" messages indicate that you take responsibility for your own thoughts, your feelings and your behaviour.

"You" Messages

When summarizing *another person's* perspective, opinion, thoughts, feelings, expectations, hopes, needs, etc. – use "You" language.
(i.e., "You were hoping that ...." or "So far you've said....")

Here's an example,

"When I think about getting that bid, I have mixed emotions. I would like to have the challenge but I'm concerned that it could greatly overload our staff. I would like an assurance that, if we get the contract, we will be allocated additional staff."

"YOU" messages	"I" messages
➤ You never listen to me.	➤ I don't feel listened to.
➤ You never let me finish my sentence.	➤ I would like to be able to finish my sentence.
➤ You make me angry.	➤ I'm angry.
➤ You are always dumping all your responsibilities on me.	➤ I feel like I'm taking on too much responsibility.
➤ You should have realized that before you went ahead.	➤ I would like to be consulted before agreeing to change.

A.B.E.A.R. - Assertive Language Model

*The point is not to turn you into a BEAR but to give you the courage to speak up when something isn't working for you.

Use for giving or when receiving feedback or to request a change in behaviour.

Before approaching someone, clarify your own concerns. Look for your interests not positions. What is the value you have around this?

Use "I' statements, not "you" statements to describe what you are seeing or hearing. Be objective, specific, and descriptive. Stay away from blaming or trigger (loaded) words.

Invite them to share their perception of the situation and any concerns they have. Gather information from the other person by listening, questioning & summarizing.

A	-	Acknowledge
B	-	Behaviour (describe)
E	-	Effect (describe)
A	-	Ask
R	-	Results/Repercussions

Work toward a mutually agreeable solution; brainstorm ideas, consider all interests and concerns, be specific.

Examples of Behaviour and Effect descriptions:

"When I am answering a question you have asked, and I am interrupted, I get frustrated."

"When John offered his solution during today's meeting, you laughed and said it would not work. I noticed that John did not offer any other ideas."

"We agreed that the meeting would start at 8 a.m. and you are 15 minutes late. It is frustrating to have to repeat what has already been covered to bring you up to speed."

		Examples
ACKNOWLEDGE	Acknowledge - your or their positive intent - the situation/effect	"I know that you and I both want this project to be a success, and we're both feeling pressure to complete it." "This reorganization has been really hard on the crew."
BEHAVIOUR	Describe the objective details/facts of what you see – i.e., **behaviour** Be specific & give examples.	"I've noticed that...." "This is the third time this week you have come in 20 minutes late." "When I asked about the status of the project you turned and walked away." "I haven't had a performance review for three years."
EFFECT	Express the **Effect** on you and/or others	"When you miss a deadline, it slows the project down for everyone." "When I don't get feedback, I don't know how you feel about my work."
ASK	**Ask** for their perspective (on what you've just described)	"What is your opinion?" "How do you see it?" "I'd like to know what you think about..."
	Ask for a change	"I'm hoping that..." "My preference is..." or "I would prefer..." "My expectations are..."
	Ask for their ideas	"How do you think we could avoid this in the future?" "What ideas do you have for improvement?" "How could we meet this objective?"
RESULT	Outcome as a **result** of their behaviour. (+) positive or, (-) corrective	"That way we can finish on schedule." Or "We will miss the deadline and lose our grant." "That way, I can focus on developing the skills I need to."

Practice:

Prepare to give someone feedback about something they are doing that you find problematic.

Write out an ABEAR script (or just make a note in each category).

ACKNOWLEDGE

BEHAVIOUR

EFFECT

ASK

RESULT

Meeting Toolkit

> Preparation

> - what is the overall goal/objective? what is the purpose of this meeting? (and subsequent meetings?), what is the desired outcome? what process (agenda) will get us there? how much time to devote to each stage in agenda?

> - where to have meeting (location)? time? where to insert breaks/lunch? what is the best room setup? location? date? length of meeting?

> - what information do participants need to bring with them? What information do they need to have read ahead of time? What do they need to do to prepare for the meeting?

> In meeting:

> - Decide early in agenda how you will make decisions (consensus, voting, Manager decides, etc.)

> - Encourage participation in meetings.

> - Create participative environment.

> - Draw out contributions from specific individuals (even those you find disruptive)

> - Manage disruptive behaviours

> - Use effective communication skills – ask open ended questions, summarize.

> - Develop an action plan for implementing solutions by using a flipchart write three headings: WHAT needs to be done, WHO will do it, and by WHEN and include FOLLOW-UP/PLAN FOR REVIEW AND IMPROVEMENT

> Facilitator/Chair:

> - Use a flipchart to record the key points made. Put a heading on top of each page to keep group's attention on topic. Use alternating colours to make content easier to read. Number your flipchart pages for easier transcribing later.

> - When brainstorming, explain how brainstorming works or, how it is going to work today.

> - When prioritizing, explain process you are going to use (green dots, show of hands, etc.)

Encourage Participation In Meetings

➢ Acknowledge and Reinforce the desired participation

    ➢ Give verbal and nonverbal reinforcement

    ➢ Protect new ideas

    ➢ Encourage expression of partial ideas

    ➢ Collectively acknowledge the group

    ➢ Express your appreciation for specific contributions after meeting

Be Clear On the Type Of Participation You Want

For the agenda item being worked on, tell participants their expected level of participation. For example, do you want:

➢ Questions to clarify information being presented?

➢ Participants' reactions to the information presented?

➢ Ideas and opinions on a subject or issue?

➢ Discussion, debate, and input on an item?

➢ Suggestions or recommendations?

➢ Generation of alternatives?

➢ An analysis?

➢ A decision?

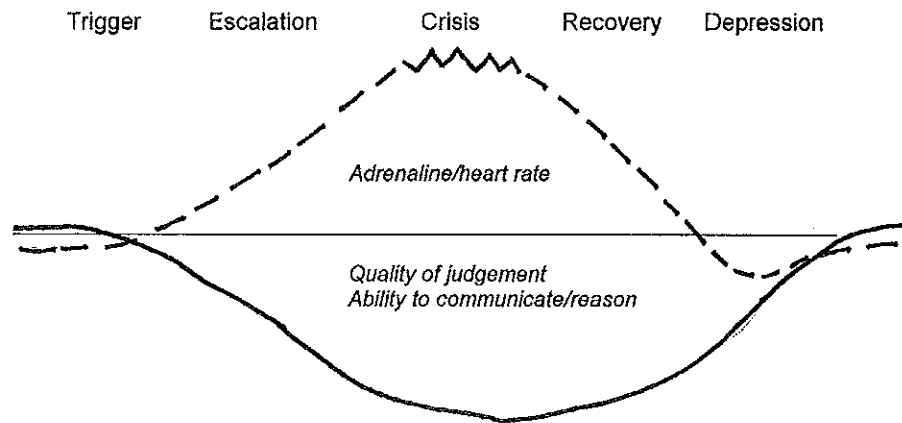➢ Two or more of the above options (and in what order)?

Create A Participative Climate

➢ Set ground rules for participation and diversity

➢ Act as a gatekeeper, i.e., See that air time is shared

➢ Keep the attention focused (on the topic, not on yourself)

➢ Prime the pump: give your own ideas if discussion is lagging

➢ Give positive non-verbals, i.e., smiling, nodding

➢ Ask open-ended questions

➢ Appoint a devil's advocate

➢ Separate the idea from the person

➢ Save your opinion until last whenever possible

Draw Out Contributions From Specific Individuals

➢ Direct your questioning (from group to individuals) (i.e., "John, what do you think?")

➢ Draw out the uninvolved

➢ Recognize peoples' strengths and resources

➢ Protect persons with minority views

➢ Seek a different point of view

Anger Arousal Cycle

Trigger   Escalation   Crisis   Recovery   Depression

Adrenaline/heart rate

Quality of judgement
Ability to communicate/reason

Stages of the Arousal Cycle

1. The Trigger
- a perceived threat or attack (physical or psychological)
- may be external (being sworn at) or internal (remembering a past situation)
- initiates the arousal cycle – body gears up for "fight or flight"

2. Escalation
- body "ramps up" – releasing adrenaline and other energizers into the blood
- rapid breathing
- pounding heart (and increased blood pressure)
- muscle tension (jaw, neck, shoulders, hands)
- raised voice and altered pitch

3. Crisis
- body is fully prepared to "fight" or "flight" – impulse is to act
- little, if any, ability to think, reason, and communicate
- physiologically unable to hear

4. Recovery
- adrenaline dissipates over time
- the quality of judgment returns – coherence begins to return

5. Post-Crisis/Depression
- heart rate drops below normal
- return of reasoning process often leads to guilt remorse or depression

Types of Self-Talk

"There is no good or evil but thought makes it so." - Shakespeare

Situation: Being confronted by an angry or distraught person.

Over-reacting: (Anger / Power)

> *Just who does he / she think he / she is anyway?*
> *This person has no business challenging me!*
> *I don't have to take this garbage!*
> *I won't look foolish in front of ....!*
> *He / she has no right to talk this way to me!*
> *Nag, nag, nag, he never lets up.*

Under-reacting (Fear / Helplessness)

> *Oh no! What's going to happen?*
> *What if they ... (hurt me, run away, disobey, etc.)*
> *What's the point of hassling this anyway?*
> *I must have done something wrong.*
> *That's what I get for ...*
> *What do I do now ?!*

Coping Self-Talk (Supportive / Problem Solving)

> *What's the real problem here?*
> *How do I feel right now?*
> *This is upsetting, but I can handle it.*
> *Take a deep breath and plan what I need to say.*
> *We need to talk about this, but I need to finish .... right now.*
> *I need to relax and problem solve here.*
> *We can resolve this problem without hurting each other.*

*Lee Alan Rengert, 1988.

Managing Emotion Triggers

1. Early Warning Signs / Triggers

_____

_____

_____

_____

_____

2. Cue to Relax / Escalation

_____

_____

_____

_____

_____

3. Self-talk Script – Self-management

_____

_____

_____

_____

_____

Managing Disruptive Group Differences

Increase firmness – start gently.

- Remain calm, prompt and firm (don't vent your irritations/anger)
- Get curious
- Acknowledge the disupter's <u>emotion</u> (anger, frustration, etc.) and the <u>content</u> of what they are frustrated or angry about
    - "You seem frustrated (emotion) with how this discussion is progressing (content)" *or* "you're angry (emotion) about the announcement (content)."
- Refer back to the ground rules (climate goals)
- Use ABEAR script – **acknowledge** that something is going on for person, describe disruptive **behaviour** (cell phone ringing, people coming/going, interrupting, etc.) and the **effect** it is having (sidetracked from discussion, getting others worked up, frustrating, etc.), **ask** for a change in behaviour or for their perspective, state potential **results** (not get solution, delay, etc.)
- Define areas of common agreement
- Clarify points of disagreement and their causes/assumptions
- Question the sources (i.e., differences in values, information, or what?)
- Ask open ended questions to get more information and understanding
    - What do you mean by...?
    - What would you hope to accomplish by...?
    - How would that help?
    - What led you to that conclusion?
    - What is your perception about...?
    - What would you like the group to understand?
- Determine possibility of resolution and take necessary steps
- Encourage group support to help all better understand each other
- Refocus the discussion the meetings objectives or purpose
- Summarize the discussion to that point
- Tell the group where you see they are at or going; remind them of their stated desired results
- **DISCUSS RECURRING DSRUPTIVE BEHAVIOUR WITH THE PERSON PRIVATELY**

Strategic Planning Model

GOAL

*Where
we want
to be.*

?

The Path(s)

*How we will
reach our
Goal*

Size-Up

*Picture of
where we
are at*
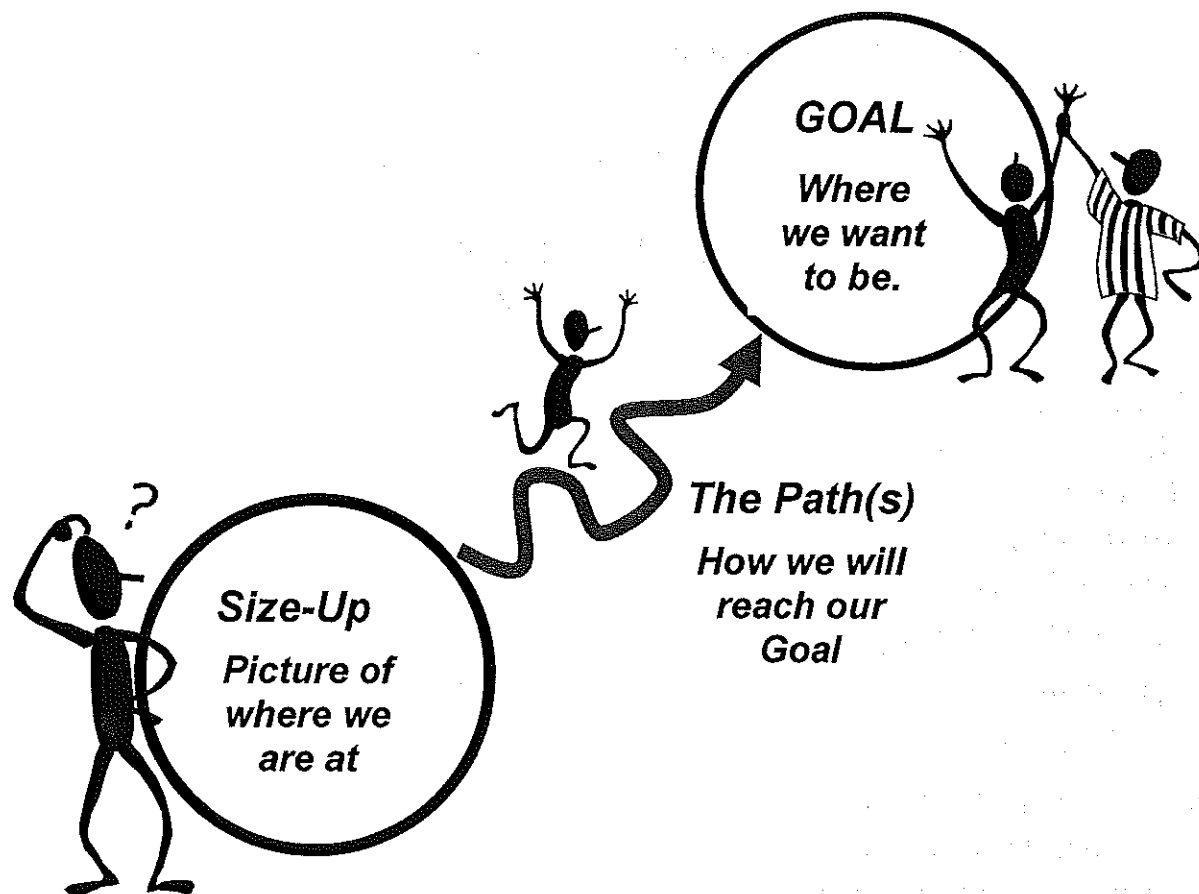
Continuous Cycle of Improvement Model

Plan ⇒ Do ⇒ Review
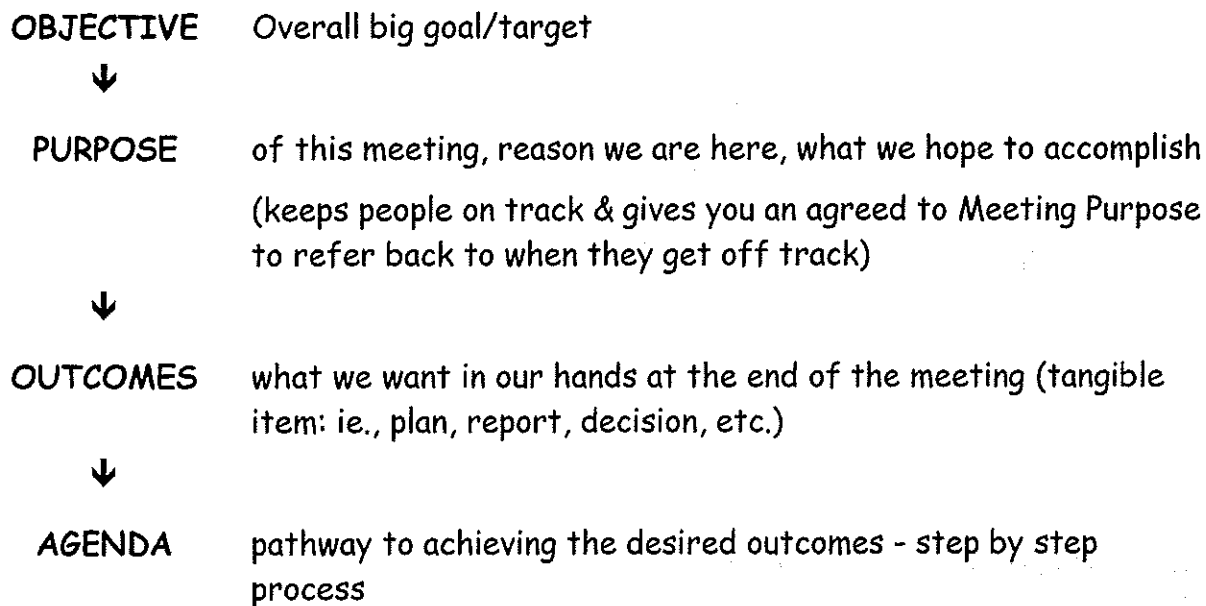
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Plan for

Improvement

Running Successful Meetings

If you don't know <u>WHERE</u> you're going or <u>HOW</u> you're going to get there, how will you know <u>WHEN</u> you get there? = the meetings that don't end!

OBJECTIVE   Overall big goal/target
   ↓

PURPOSE   of this meeting, reason we are here, what we hope to accomplish

               (keeps people on track & gives you an agreed to Meeting Purpose to refer back to when they get off track)

   ↓

OUTCOMES   what we want in our hands at the end of the meeting (tangible item: ie., plan, report, decision, etc.)

   ↓

AGENDA   pathway to achieving the desired outcomes - step by step process

With a clear <u>OBJECTIVE</u> - you'll know <u>WHERE</u> you're going

The clearly defined <u>PURPOSE</u> - will keep your meeting focused and on track (reason for meeting)

The desired or expected <u>OUTCOMES</u> - will indicate <u>WHEN</u> you've arrived (reached your goal).

Your <u>AGENDA</u> - will outline <u>HOW</u> you're going to get there (by keeping you focused and on track and walk you through your meeting from beginning to end

The "Purpose" Of Today's Meeting

There is nothing more important than being clear about the purpose of the meeting. This step is critical for effective decision-making that will take place later on.

WHY IS IT AN IMPORTANT STEP?

➢ Participants like to know the answer to "why are we meeting?"
➢ A clear purpose sets the tone for the meeting.
➢ It helps keep the group on track and on time.
➢ It reduces potential for conflict and frustration.
➢ Establishes the validity for the time members are investing.

HOW DO YOU DO THIS STEP?

Before the Meeting:

➢ Determine an answer to the question "Why are we getting this group together at all?" - the "WHY" to what we are attempting to accomplish.
➢ The purpose statement usually begins with an action word (verb) ie., "To (verb - plan, decide, etc.)." NOTE: Some answers generated in the discussion will likely be outcomes or the specific things the groups wants to accomplish during the meeting itself (development of a step-by-step process). These should be captured for the next step - Expected Outcomes.

At the Meeting:

➢ At the start of the meeting, remind the group of the need for a clear purpose.
➢ State clearly the Purpose of the meeting
➢ Test specific words that could be vague to ensure shared understanding of meeting (ie., words like "communication" - what do we mean by that?)
➢ Ask for agreement
➢ Discuss and resolve any suggested change to the Purpose, if required.
➢ Keep the Purpose visible, ie., posted on the wall during the meeting.

The "Expected Outcomes"

> What are we going to have in our hand when we leave the meeting?

WHY IS IT AN IMPORTANT STEP?

> If you don't know where you are going, "then it doesn't matter which way you go!!" You must know where you want to go, or what you want to achieve - a clear picture of the expected outcomes - so participants can better visualize the outcomes and deliverables of the meeting.

> Clear desired outcomes help keep a group on track

> Specific Expected Outcomes provide clear criteria for evaluating progress

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HOW DO YOU DO THIS STEP?

Before the Meeting:

> Ask yourself the question "What are we trying to achieve as a group?" and "What is it that we want to have in place at the end of this activity that is not in place now?" - "WHAT" we are going to generate.

> It is sometimes helpful to think that the meeting has occurred, and you want to describe its success, ie., "By the end of the meeting we had: 'increased our understanding of...' 'made a decision on....' 'planned the...', etc.

> Outcome statements should be single sentence statements which should normally begin with a verb (action word).

At the Meeting:

> At the start of the meeting, after giving the Purpose, state clearly the outcomes expected from this group activity.

> Ask participants if that is their understanding of the meeting outcomes and, also, if anything has been missed.

> Discuss, resolve and gain agreement on what the desired outcomes are.

> Keep the Expected Outcomes visibly posted throughout the meeting.

> Tie back to the relevant desired outcome at the start of each process step.

The "Agenda"

The AGENDA is the pathway that will lead the group to the expected outcomes for the meeting (sequential set of activities). The agenda should outline a <u>step-by-step process.</u>

WHY IS IT AN IMPORTANT STEP?

➢ Participants like to have a "road map" of the meeting, which shows them the "route" they will follow to reach their "destination(s)" or achieve the desired outcomes.

➢ It will keep the meeting on track. If it deviates from the Agenda, the facilitator can refer to where we should be and what we should be discussing.

➢ Meetings take valuable time. Having a clear and comprehensive Agenda optimizes effective and efficient group activity time.

HOW DO YOU DO THIS STEP?

Before the Meeting:

➢ Once you have established the Purpose and Expected Results of the group activity, you can select the steps and facilitation tools you'll use to facilitate the group meeting. Be flexible, be prepared to consider alternatives.

➢ The more prepared you are going in the better you'll be able to respond to the group's needs.

At the Meeting:

➢ At the start of the meeting, after giving the Purposes and Expected Results, state clearly an overview of the Agenda that is suggested to be followed.

➢ Ask participants for agreement on the Agenda. Discuss, and resolve any suggested changes, deletions, or additions to the Agenda made by the group.

➢ NOTE: any suggested change to the Agenda made by the group needs to be compared against the Meeting Purpose and Expected Outcomes to ensure consistency. If the suggested agenda item does not fit with the Purpose and Outcomes recommend it be tabled to be addressed at the end of the meeting or tabled to another time.

➢ Keep the Agenda items visibly posted throughout the activity.

➢ Refer back to the Agenda at the start of each new agenda item, at which time explain the agenda item in more detail.

The "Action Plan"

WHY IS IT AN IMPORTANT STEP?

- ➤ Makes clear **WHO** does **WHAT** by **WHEN**
- ➤ Sets a date for **review** and **plan for improvement**.
- ➤ Draws the meeting to an end.
- ➤ Allows an opportunity to clarify the next steps to ensure a clear understanding by all.
- ➤ Gains needed commitment – it's in writing!

HOW DO YOU DO IT – WHAT DOES IT LOOK LIKE?

As each item or topic is finished,

- ➤ Write the outcome on a flipchart sheet – WHAT NEEDS TO HAPPEN
- ➤ Identify person who has agreed to take responsibility to see that it is done AND names of others who will be helping – BY WHOM
- ➤ Record when they will start and finish the task – BY WHEN

A suggested format is to write these headings on the top of a flipchart:

     WHAT   WHO   WHEN   R – PFI

                                         (review, plan for improvement)

IMPORTANT NOTE: Do not end the meeting or allow anyone to leave until the action plan is complete.

Possible Meeting Scenarios

1. Create a list of all the issues. Prioritize that list & highlight top 1 - 3 issues (to deal with individually at future meetings).

    PRIORITIZE = use green/red dots, show of hands, marks, consensus, whatever.

2. Take one issue (identified at previous meeting with high priority) and identify solutions & create an action plan to implement ideas.

3. Action Plan review and Plan for Improvement - what worked, what didn't, what can we do to address what didn't work?

4. Information sharing - what you hope to cover, how come (importance), timeline, etc.

5. Plan/manage a project (in one meeting or a series of meetings).

Note:

> *Creating a list of issues (#1) and identifying solutions and creating an action plan (#2) can take place during one meeting or spread over more than one meeting, depending on how much time you have.*

> *Similarly, planning a project may take one or many meetings.*

> *An entire meeting can be devoted to Planning for Improvement or Sharing Information.*

Summary

Objective:

It isn't necessary to post the Objective - it is important to be clear about what it is.

Ask yourself "What's the Target/Goal/Vision for this committee or project?"

i.e., *To have a safe workplace.*

To achieve ISO____ certification.

To produce xxxxx board feet.

To develop an environmental plan that addresses _____.

Purpose – Today's Meeting:

The focus of today's meeting. What is the specific desired deliverable for this meeting? (and how does that compare to the purpose of subsequent meetings that are all aimed at achieving the "big picture" objective.)

Post the "Purpose of Today's Meeting" on a flipchart.

Outcomes for Today:

Ask yourself, "if we were to be successful in our meeting [achieving its purpose] what would we have in our hands by the end of the meeting?"

i.e., *Increase our understanding of...*

Make a decision about...

Plan the ...

Investigate ...

Post "Outcomes" on a flipchart

Agenda:

A step by step process you are going to follow to take you from where you are at to achieving your desired outcomes for today. For example,

1. Review Objective, Purpose of Today's Meeting, Outcomes for Today, & Agenda.
2.
3.
4.
5. Create action plan, including review/plan for improvement.
6. Adjourn meeting.

Safety
Workshop Practice

Objective:

To have a safe workplace.

Purpose – Today's Meeting:

To agree on one key issue that we will work on over the next month and how.

Outcomes for Today:

1. A list of all current safety issues.

2. Identification of a key issue.

3. An action plan to address key issue

Agenda:	
1. Go over Objective, Purpose of Today's Meeting & Outcomes for Today.	Facilitator #1
2. Brainstorm a list of current issues	
3. Prioritize list	Facilitator #2
4. Identify top ranked issues (2 or 3)	
5. Take one issue and:	Facilitator #3
a) discuss why it is an issue, who is affected by it, etc.	
b) brainstorm a list of ideas that might correct the situation	
6. Agree on corrective action	Facilitator #4
7. Create an action plan for implementing solutions	
8. Identify our Next Steps (what will we do with plan we have just created?)	Facilitator #5

SQCDE
Workshop Practice

<u>Objective:</u>

<u>Purpose – Today's Meeting:</u>

<u>Outcomes for Today:</u>

Agenda:	Facilitated by

Project Planning Situation
Workshop Practice

At the end of this exercise, you will have:

➢ Created an objective, purpose, and outcome(s) for the meeting

➢ Designed an agenda and experienced the results

➢ Experienced group dynamics around problem solving and decision making

➢ Identified general facilitation skills that can enhance meeting success

➢ Provided helpful feedback to each other than can be used to improve performance

➢ Shared your learning from this experience

Group Exercise - 2 Parts

First – DESIGN A PROCESS

- Identify the objective, purpose, and expected outcomes of this exercise.
- eate a step-by-step agenda.
- Decide who will facilitate which piece of process.

Second – FACILITATE THE PROCESS

- Follow the agenda to achieve your objective, purpose, and outcomes.

Development Plan

What I did well/Strengths

_____

_____

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_____

Opportunity For Improvement

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What I Will Try Next Time:

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