

SECTION TWO:

Basic Principles for Holding an Effective Meeting



Presented by Dale Klein



In this section you'll learn the meeting tools you will need to succeed in holding an effective community-based meeting. We will discuss and identify six meeting tools to solve and address the common problems that most of us experience when we are in meetings. These tools will focus on the areas of:

- Advance planning
- Agendas
- Roles
- Setting ground rules
- Minutes and
- Evaluations

Getting Results: How to Work a Meeting You Organize

Being the organizer of a meeting is different from attending a meeting. In this section we will delve into each of the six meeting tools in greater detail to ensure that you can successfully apply them to your world.

You'll also learn how to effectively manage some of the typical behaviors that are exhibited during meetings so that your meetings remain productive. Finally, you'll have the opportunity to develop your own action plan to ensure that you make the best use of the skills you've learned.

Basic Principles of Holding an Effective Meeting

A. Why do meetings get such a bad reputation?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

B. What are the Six Meeting Musts?

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____



SAMPLE Meeting Agenda

Meeting Date: _____ **Leader:** _____ **Time Keeper:** _____
Project Name: _____ **Attendance:** _____
Location: _____
AIM: _____

Objective(s) of the meeting {record additional attendance on opposite side}
 1. _____
 2. _____
 3. _____

Item	Minutes Allocated	Topic	Summary of conclusions, decisions, assignments, and next steps
1.	2	Review agenda	Add, modify or delete items. Allocate time needed for each item.
2.			
3.			
4.			
5.			
6.			
7.	2	Plan next agenda	1. _____ 2. _____ 3. _____ 4. _____ 5. _____
8.	2	Meeting review on content and process	

Next Meeting
Date: ___/___/___ **Start Time:** _____ **End Time:** _____ **Location:** _____
Recorder: _____



SAMPLE

[Title of Meeting] Meeting Minutes

Meeting attended by:	
Absent from meeting:	
Date:	
Time:	
Agenda Topic #1:	Deadlines:
Write Minutes here	
List Action Items here: <ul style="list-style-type: none">••••	
Agenda Topic #2:	
Write Minutes here	
List Action Items here: <ul style="list-style-type: none">••••	
Agenda Topic #3:	
Write Minutes here	
List Action Items here: <ul style="list-style-type: none">••••	
Next meeting will be held on mm/dd/yyyy at 00:00	



ARTICLE:

5 Ways to Lead a Meeting: Make 30 Decisions in 30 Minutes



Glenn Llopis, Contributor

Time is our most precious asset, yet many don't know how to manage or value it. The workplace demands that we multi-task; employees lose focus and become disorganized, making it difficult to make good decisions and build momentum. Meetings at work have become a commodity - we have too many of them that are not adding substantive value. As such, meetings are losing their impact, becoming distractions and forums for political maneuvering. It's time to rethink how leaders can maximize engagement and their opportunities when people are asked to come together as one.

Meetings should be the exception, not the rule. The new workplace requires us all to be more entrepreneurial; this means that people must manage their responsibilities as if they were managing their own business. In other words, employees must become less dependent on requesting "face time" with their colleagues and more accountable to get things done virtually using the communications tools and technologies that are at one's disposal.

Meetings should be taken seriously and every participant should come fully prepared for both the expected discussion topics (the agenda items set forth by the leader) and the unexpected topics (the agendas that individual participants may bring with them). Today's meetings should be quick and to the point. Every minute matters and everyone's time should be valued. Meetings should result in increased focus on goals, with accountability designation on mutually agreed upon action items that lead to building momentum and reaching the bottom-line result.

The goal of a meeting is to make decisions. The best leaders can make at least 30 solid decisions in 30 minutes throughout the course of a meeting. Yes, that's a decision every minute, but they are not only making decisions about the agenda items - but about the participants, their leadership styles, behavior and attitude, preparedness or lack thereof, the group's confidence level, their ability to perform and generate desired outcomes, and so on.

In fact, if you are not the meeting leader (host), you can more effectively engage in a meeting by listing the number of decisions that you believe the leader should be making. Next time you are in a meeting, take note (in keyword form) of the different decisions that you believe the meeting leader should be making. Perhaps you can see decisions that she/he can't see and this will give you the opportunity to compare notes with other meeting participants and the leader. This approach also allows you to identify how effectively the leader is managing the agenda and participant engagement, and whether or not the meeting is resulting in increased focus and momentum.

Most meetings are ineffective because the agenda is unclear and the participants are too focused on the political dynamics in the room rather than on being part of the solution to the problem or an enabler of the opportunity presented.

If you are having trouble making your meetings productive (and worthy of people's time), here are five ways to lead a meeting and make 30 decisions in 30 minutes.

Are You Having the Meeting for a Tangible Reason?

Don't have a meeting if you don't believe you can generate a tangible call to action that will impact the business. Participants must come prepared and their collective preparedness will lead to a set of manageable actions that will get you closer and faster to a measurable bottom-line outcome.

Too many times, meetings are scheduled simply to get an update. As the leader, you must be close enough to the business to have a strong enough pulse on it - at all times. This should also be the case for the participants on the team. The best teams represent interconnected parts and therefore should be well aware of critical updates without having a meeting. Besides, this is where project management software and other types of technology can save a lot of time and eliminate "update" meetings.

Define the Agenda Carefully and Stay on Point

This advice sounds simple, but most leaders miss the mark. The agenda should be centered on one of two things that impact the bottom-line: solving an important problem or enabling an opportunity. Each of these

areas will be a by-product of the plan that your department is executing. They should result in either helping to cut costs or increase revenue.

The agenda must focus on eliciting key insights from the leader and /or the participants to achieve the desired meeting results. The agenda should be sent out with enough advance notice to assure that all participants are prepared in the meeting to intelligently address agenda items, make timely decisions and designate appropriate action items.

The meeting should stay focused on the agenda items at hand. Should participants use this meeting to introduce their own agendas, acknowledge them if they support the goals of the meeting but be certain to assure this type of behavior is minimized if they cause distraction.

Stay on point, remain focused on the objectives at hand and build the appropriate momentum to reach your desired result.

Participant Meeting Expectations Must Be Made Clear

When inviting people to a meeting, your expectations for each person must be made clear in advance of the meeting. Every participant should be assigned a specific role at the meeting and be expected to contribute and “speak-up.” Invite those who play a direct role in advancing the agenda as well as those with a more indirect role who can add value to the dialogue and outcome of the meeting.

Value people’s time! Remember that everyone is busy and a meeting always adds more to each person’s workload. As the meeting leader, think about how each participant can benefit from the meeting itself. Perhaps a participant’s right-hand person (e.g., executive assistant or direct report) is more than capable of attending on behalf of their boss. Be mindful of the tasks that everyone has on their own plate. Don’t disrupt their flow – if it isn’t necessary. Weigh the pros and cons.

Request Feedback and Recommendations

At the end of the meeting, take no more than five minutes and go around the room and request closing remarks from attendees. This is the time when you should be getting objective feedback about the meeting and any final recommendations – when people can be extremely candid

about the time spent together and share any last minute thoughts and suggestions.

This is also the time for those who didn't have a chance to speak-up earlier; and for you to make any final decisions about next steps before ending the meeting.

List Your 30 Decisions and Define Your Action Plan

As a follow-up to the meeting, list your 30 decisions, prioritize them and note which participants helped you make them and why. From this you can finalize your action plan.

This may appear to be a lot of work and overdoing the follow-up, but it is required for you to understand how effective you were in leading the meeting and deriving your ultimate plan of action. Besides, the more you take on this discipline, the more you will begin to see how you think and evolve during the course of a meeting.

It also allows you to understand how to better utilize participants in the future and how you can provide them with the proper feedback and guidance to help them lead their own meetings.

You may also want to share your 30 decisions with your boss – not only to give them a stronger pulse on your needs to help the business, but also to help them give you better feedback to make you a more effective leader.

Remember to always make your meetings matter. Don't waste time and get to the point. These five suggestions will make you much more productive and get you on track to building a high-performance team. Thirty decisions will quickly become 50 once you master this method.

Article From: Contributed by: Glen Llopis; <http://www.forbes.com/sites/glennllopis/2012/12/17/5-ways-to-lead-a-meeting-make-30-decisions-in-30-minutes/>

Getting Results: How to Work a Meeting You Organize

A. Advance Planning

- 1.
- 2.
- 3.
- 4.
- 5.

B. Agenda

- 1.
- 2.
- 3.
- 4.

C. Roles

- 1.
- 2.
- 3.
- 4.
- 5.



ARTICLE: Direct Action Organizing



There are different methods of organizing or ways of making social change, and all have their uses. Midwest Academy uses and teaches the “Direct Action Organizing” concept. Direct Action Organizing is based on the power of people to take collective action on their own behalf. The point is not that one approach is better than the others. In fact, often many kinds of organizing are needed, but the Midwest Academy focuses on Direct Action Organizing.

<u>METHOD</u>	<u>EXAMPLES</u>
Direct Service	Affordable housing development. Insulating or weatherizing homes. Shelter. Soup Kitchen.
Education	Issue research. Teach people how to look for an apartment. Cultural events.
Self-Help	Neighborhood clean-up day. Baby sitting co-op.
Advocacy	Propose laws or regulations on behalf of people who don't necessarily know that it is being done.
Direct Action	The people who have the problem take action to solve it. Make the city clean up the street or provide child care.

Here is an example of the differences:

Suppose an organizer encountered a situation in which there were a large number of homeless people in the community.

- If the organizer went out and started convincing neighborhood religious institutions to put cots in their basements for the homeless, that would be a service approach. The organizer and the congregations would be doing a direct service for people.

- If the organizer started doing studies about the causes of homelessness and how it was dealt with in other cities, and then distributed the information, that is an education approach. There are many groups that exist mainly to educate people about some social issue.
- If the organizer began to hold workshops for homeless people about how to find a house or a job, that would be a self-help approach. The idea is that people can solve their problem by improving themselves or their knowledge of themselves, and that they can often do it better in groups.
- If the organizer went down to City Hall to lobby to get the city to open shelters and food programs, that would be an advocacy approach. The people without homes would not necessarily be involved or even know that the organizer was doing it.
- If the organizer started talking to homeless people and organized a large number of them to first decide on the solutions that they wanted, and then to pressure the city to win those solutions, that would be a direct action approach. The people directly affected by the problem, what ever it is, take action to win a solution.

There Are Three Fundamental Principles Of Direct Action:

1. Win concrete improvements in people's lives.
2. Make people aware of their own power (by winning victories).
3. Alter the relations of power between people, the government, and other institutions by building strong permanent local, state and national organizations.

We all have ideas about how society could be better in the future, but when we say “win improvements”, we mean today, here and now concrete improvements, like wining smaller class size in schools, getting doctors to accept Medicare assignment as payment in full, forcing the city to build affordable housing, or requiring utilities to produce energy from such renewable sources as wind and sun.

When we say that we want to give people “a sense of their own power”, we mean that people themselves are involved in winning the issue. If an advocate goes out and speaks for you, or if a lawyer sues for you, you get a sense of the

power of the advocate or the lawyer, but not of your own power. Direct Action Organizing brings people directly into the situation in large numbers so that they know that they won. Why does it matter? Because people who develop a sense of their organized power are more likely to stay active and take on larger issues.

When we say that we want to “alter the relations of power”, we mean building organizations that those in power, at all levels of government, will always have to worry about. Whenever they decide to do anything that has an impact on your group, they are going to have to say “wait a minute”, how will that organization react to this? We also know from sad experience that what is won this year can be taken away next year if the organization that won it disappears or is weakened. In Direct Action Organizing, building an organization is always as important as winning a particular issue.

The Six Steps of Direct Action Organizing

When we engage in Direct Action Organizing, we organize a campaign to win a specific issue, that is, a specific solution to a problem. We have observed that an issue campaign usually goes through this series of stages.

A. People identify a problem

The people who have the problem agree on a solution and how to get it. They may define the issue narrowly: “Make our landlord return our rent deposits when we move out.” Or, they may define it more broadly: “Make the city council pass a law requiring the return of rent deposits.”

If the landlord owns only the one building, the tenants may be able to win on their own, but if the landlord owns many buildings around the city, then building a coalition to pass a law might be the best way.

B. The organization turns the problem into an issue.

There is a difference between a problem and an issue. An issue is a specific solution to a problem that you choose to work on. You don’t always get to choose your problems. Often your problems choose you. But you always choose your issues, the solution to the problem that you wish to win. Air pollution is a problem. Changing the law to get older power plants covered by the same air quality regulations that apply to newer plants is an issue.

C. Develop strategy.

A strategy is the overall plan for a campaign. It is about power relationships and it involves asking six questions:

1. What are your long and short term goals?
2. What are your organizational strengths and weaknesses?
3. Who cares about this problem?
4. Who are your allies?
5. Who has the power to give you what we want?
6. What tactics can you use to apply your power and make it felt by those who can give you what you want?

D. Bring many people to face the decision-maker.

Use large meetings and actions to force the person who can give you what you want to react. That person is the decision-maker. The decision-maker is often referred to as the “target” of the campaign. The decision-maker is always an individual person or number of individuals, never a board or elected body as a whole. Decision making bodies must be personalized. So, if you are trying to get something passed by the City Council, for example, you don’t say the decision-maker is the City Council. Rather you need specific members of the council to vote on our issue. Who are they? Name them. What is your power over them? Do you have members in their districts?

E. The decision-maker reacts to you.

You either get what you want or you have to go out and organize still larger numbers of people for a second round of the fight. Sometimes it takes several rounds before the fight is won. That is why we think of organizing as a whole campaign, not just as a series of one shot events.

F. Win, regroup, and go on to next campaign.

Article From: Midwest Academy ; <http://www.midwestacademy.com/sites/default/files/Direct%20Action%20Organizing.pdf>

For more information refer to Organizing for Social Change: Midwest Academy: Manual for Activists by Kimberly Bobo, Jackie Kendall and Steve Max.