Effective Meetings

After today’s training you will be able to:
♦ Describe meetings as a process
♦ Explain different roles in a meeting
♦ Develop meeting agendas
♦ Build future follow-up into the meeting

Kathy Schalk-Greene - Mount Laurel Library
kathy@mtlaurel.lib.nj.us
LOOK AT MEETINGS AS A PROCESS

BEFORE
What outcome do you want?
Build an agenda ... ask for input
Who needs to be notified?
Any pre-meeting preparation for members?

DURING
Members know
- why they’re meeting
- how to participate
Next steps:
Who
does What
by When

AFTER
Send summary of the meeting (action items, decisions)
Who actually did what by when and how do you know?
# ROLES IN MEETINGS

<table>
<thead>
<tr>
<th>LEADER/CHAIR</th>
<th>FACILITATOR</th>
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<tbody>
<tr>
<td>♦ Calls the meeting</td>
<td>♦ Helps the group focus</td>
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<tr>
<td>♦ Develops agenda</td>
<td>♦ Helps group stay on track</td>
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<tr>
<td>♦ Sets the tone</td>
<td>♦ Encourages participation</td>
</tr>
<tr>
<td>♦ Opens meeting/reviews agenda</td>
<td>♦ Remains neutral</td>
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<tr>
<td>♦ Closes meeting</td>
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<tr>
<td>♦ Manages meeting follow-up</td>
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</table>

<table>
<thead>
<tr>
<th>RECORDER</th>
<th>MEMBER</th>
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</thead>
<tbody>
<tr>
<td>♦ Records key ideas/phrases on flip chart</td>
<td>♦ Prepares for meetings</td>
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<tr>
<td>♦ Supports the facilitator</td>
<td>♦ Contributes ideas</td>
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<td>♦ Asks for group's help for accuracy</td>
<td>♦ Listens</td>
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<tr>
<td>♦ Does a one-page summary of meeting with key ideas, decisions, and follow-up</td>
<td>♦ Open &amp; positive</td>
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<td></td>
<td>♦ Supports the meeting process</td>
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<table>
<thead>
<tr>
<th>Timekeeper</th>
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<tbody>
<tr>
<td>♦ Helps group keep to time frames on agenda</td>
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<tr>
<td>♦ Participates in meeting</td>
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Effective Meetings, February 2005

Kathy Schalk-Greene
SETTING THE AGENDA

An agenda is a road map for a meeting ... both for leaders and members

Think about Outcome (where), Content (what), and Process (how)

Successful agendas include:

♦ Purpose of meeting
♦ Proposed outcomes of the meeting
♦ Who should attend
♦ Date
♦ Start & end times
♦ Location
♦ How members can prepare before the meeting
♦ Items to discuss/decide
  - Time frames for each piece
  - Who is responsible
♦ Include time to determine next steps
  - What follow-up is needed from this meeting
  - Who does what by when
♦ Contact person

Successful agendas are distributed before the meeting
**Purpose:** Orient 2003-04 New Jersey Library Association Member Services Committee members  
**Outcome:** Clear plan for 2003-2004 with action steps

**Before the meeting:**
- Look at new NJLA web page design [http://temp.njla.org/index.htm](http://temp.njla.org/index.htm)  
  NJLA Strategic Plan (Goal 5), NJLA Code on Committees, Membership Comparisons  
- Review Draft Membership Database Schema

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda Item</th>
<th>Description</th>
</tr>
</thead>
</table>
| 10:00 | Welcome & Introductions | Kathy Schalk-Greene, chair  
Icebreaker  
Give us your name, library, and project yourself in time one year and answer this question...  
What’s made this such a successful year for the NJLA Member Services Committee? |
| 10:15 | Agenda Review | Kathy  
Meeting roles:  
- timekeeper:  
- recorder:  
Committee:  
- Ground Rules |
| 10:25 | Review Committee Function within NJLA | Kathy & Pat Hannon, NJLA President  
- How to determine what our membership wants? what will want to make librarians join NJLA? |
| 10:45 | NJLA Membership Database | Debbie Dennis  
- Review proposed data elements in the Draft Membership Database Schema  
- How the database could be used to support/increase membership  
- Next steps for Member Services Committee |
| 11:10 | Break |  |
| 11:25 | Develop Plan for Member Services Committee for 2003-04 | (see August 2002 minutes)  
- Identify needed elements  
- Establish priorities  
- Develop Action Plan  
- Who is Responsible ... by when |
| 12:15 | Summarize Next Steps | Evaluate Meeting  
Set Next Meeting  
Date:  
Location:  
Agenda: |
Meeting Checklist

AGENDA

Group:

PURPOSE of meeting:

Outcomes/results:

Who should attend:

Should be notified:

Date:

Time: Coffee: Start: End:

Location:

Room set-up:    Equipment needed?    Refreshments served?

Pre-meeting preparation (what should participants read/think about/do before the meeting?)

<table>
<thead>
<tr>
<th>Time</th>
<th>What</th>
<th>Who</th>
<th>Cost/Budget</th>
<th>Follow-up</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Introductions</td>
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<tr>
<td></td>
<td>Agenda Review</td>
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<tr>
<td></td>
<td>Summarize Next Steps</td>
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<tr>
<td></td>
<td>Meeting evaluation:</td>
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<tr>
<td></td>
<td>• How did we do?</td>
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<td></td>
<td>• How could we improve?</td>
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TIME SAVING TIP: You can reformat your agenda into meeting minutes.
Written reports

- Aim to distribute in advance via email (set a deadline)
- Highlight important points verbally
- Identify what action is needed to move forward

That’s an idea! (It just doesn’t fit this meeting)

- Using “The Bin”
- Refer to an appropriate group for consideration

Dealing with problem situations
EFFECTIVE MEETING TOOLS

Name Tents

Hand Outs
  Use different colors to make paper management easier

Flip Charts

Markers
  Use watercolor (not permanent) markers.
  These won't stain and don't smell toxic.
EVALUATING MEETINGS

♦ Did you achieve the **objectives** of the meeting

♦ Did you use **time wisely**?

♦ Were the members **satisfied**?

AFTER THE MEETING

**Meeting summary**

♦ Aim for brevity - use bullet points

♦ Key decisions and follow-up (who will do what by when)

♦ Aim for sending a.s.a.p. after the meeting

**Checking on Follow-Up**

♦ Build-in a process for follow-up during the meeting
RESOURCES

PRINT

WEB
www.interactionassociates.com

Interaction Associates developed the method which is described in the book, How to Make Meetings Work.

This site has lots of tips for improving meetings and facilitation skills.