

Effective Meeting Planning and Facilitation*

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A meeting is the “soul” of any organization. Meetings are where critical decisions are made, important announcements are stated, and reports are given. For many community-based organizations, meetings are the critical point at which information is shared among staff and community members. In order to serve the community effectively, meetings need to accomplish their goals of informing and providing a forum for discussion of issues and actions.

A poorly-run meeting cannot only fail to meet these goals, but can also present a negative image of an organization, discouraging persons from becoming involved. For these reasons, it is necessary to make a meeting efficient. To have an efficient meeting, it must be well-planned, well-focused, interactive, and productive.

This issue of the NCLR Leadership Bulletin points out some of the factors that should be considered when

EXAMPLES OF MEETING GOALS

- To develop a strategy and timeline to implement a project or event,
- To recruit new members,
- To evaluate goals or programs and to plan for the future, or
- To decide upon organizational positions.

planning and holding a meeting. It focuses on the preparation of a meeting, including such aspects as the location, scheduling, agenda, and arrangements of the meeting room. The facilitation of the meeting is also discussed, as well as some “dos” and “don’ts” of a meeting.

Preparation

Purpose

The preparation of a meeting sets the standard for the facilitation and efficiency of the meeting. Many organizations underestimate the time needed to plan and organize a good meeting. The first thing needed for a meeting is a purpose, a goal. A meeting should not be held just be-

cause that is what is done each month; every meeting should have concrete, measurable goals that can be realistically accomplished.

Examples of meeting goals are:

- ❖ To develop a strategy and timeline to implement a project or event,
- ❖ To recruit new members,
- ❖ To evaluate goals or programs and to plan for the future, or
- ❖ To decide upon organizational positions.

Once the goals of a meeting have been determined, other pre-meeting items can be handled, such as the meeting location; meeting time; communication with the members; the agenda; background materials and proposals; the roles of the facilitator, notetaker, timekeeper, presenter(s), and greeter(s); and the arrangements of the meeting room.

Meeting Location

The choice of a meeting location can affect who comes to the meeting. Some criteria to be considered when choosing a meeting location are:



* Much of this article is based on NCLR Effective Meeting training materials and *Organizing for Social Change*, Kim Bobo, Jackie Kendall, and Steve Max for Midwest Academy, Washington, Seven Locks Press, 1991.

Familiarity — is it a place with which people are familiar and comfortable? Do they know how to get there?

Accessibility — is the meeting location accessible to those interested in attending and those you are trying to reach? Make sure that the location is accessible to persons with disabilities and the elderly. Also, make sure that the location is central and easily accessible by public transportation.

Relevance to Constituency — is the location relevant to the members of the organization or the target group? For example, a Latino community center or a school might be a good site for a meeting of an organization made up of mostly Latinos.

Adequate Facilities — different meetings require different facilities. A small, informal meeting

ASPECTS OF A MEETING LOCATION

- Familiarity
- Accessibility
- Relevance to Constituency
- Adequate Facilities

needs a small, comfortable room, while a large general meeting needs larger rooms with more elaborate facilities. Also, meetings for senior citizens may require a sound system, and meetings which will have parents of young children should provide a safe place for child care.

Meeting Time

A meeting should be scheduled at a time which is convenient for all who want to attend. If the group consists of parents, they may not be

ROOM ARRANGEMENTS TO CHECK

- Seating Arrangements
- Writing Equipment
- Wall Space
- Electrical Outlets
- Sign-In Sheets
- Refreshments
- Microphone Set-Up

available in the early afternoon, due to family responsibilities. A group of working adults may all work a swing shift, from four in the afternoon to midnight, and therefore be available at midday. Ask your attendees for possible options.

Once meeting times and dates are set, keep them regular and consistent. For example, hold a meeting every first Wednesday of the month at 7:00 pm. This will allow your attendees to plan ahead, improving attendance — irregular meeting times dissuade people from attending.

It is important to remember that often no single meeting time is convenient for everyone; you should try to meet the needs of the majority of the participants, however.

Communication with Members

Always keep constant communication with your members regarding meeting times and other important issues. A contact person and phone number should be readily available for anyone who would like more information about meetings and the organization. If an emergency meeting is needed, make sure that all members are contacted either by you, the organization's secretary, or a designated person.

Background Material/Proposals

Any background material that may be useful for the members in making an effective decision should be delivered at least a week before

the meeting. This saves time during the meeting and provides a reference point for participants. Proposals should also be sent to the attendees with ample time for review, permitting members to identify points of concern or disagreement.

Room Arrangements

At least an hour before a meeting is scheduled to begin, you should make sure that the room is adequately arranged. Specific items to be checked include:

Seating Arrangements — different types of meetings have different seating set-ups. A formal meeting should have a theater arrangement, while a meeting which will involve discussion and an "open floor" should be arranged in circles or around tables. Try not to have more seats available than needed. It is better to add seats than to have many empty chairs.

Writing Equipment — an easel with newsprint pad and colored markers should also be available to present major points during the meeting.

Wall Space — there should be adequate wall space to hang newsprint paper for important notes that members might want to read during a discussion. Also, make sure that tape that will not damage the walls is available to hang the newsprint.

Electrical Outlets — the room should have adequate electrical outlets for audio-visual equipment. Outlets might be distant

from where you would like to set up equipment, so an extension cord may be necessary.

Sign-In Sheet — a sign-in sheet should be available as soon as members enter the room, preferably on a table next to the entrance. The sign-in sheet will provide you with a mailing list for the minutes and a roster for your records. The sign-in sheet should have space for names, addresses, and phone numbers.

Refreshments — consider providing refreshments before, after, or during a break in the meeting. During a meeting, one or two people should be assigned the

TIPS TO IMPROVE TURNOUT

- Keep meetings regular
- Begin and end meetings on time
- Remind people about meetings
- Arrange transportation and child care

responsibility of bringing the refreshments, cups, and plates for the next meeting.

Microphone Set-Up — if a microphone is needed for the meeting, make sure it is set up and tested in advance, and that you are aware of how to adjust the volume and the height of the microphone.

Turnout

To assure a good turnout for a meeting, consider the following:

Keep meetings regular. If meetings are to be held every two weeks, they should remain so. In the event of a change, all members should be contacted.

Begin and end meetings on time. People will often arrive late to a meeting if they know it will not begin on time, thus pushing the

start farther back. Also, people are discouraged from attending a meeting if they believe it will last much longer than scheduled.

Remind people about meetings.

Do not rely solely on mailings to get people to a meeting. Assign a few people to call members a few days before the meeting to remind them about the meeting time and place and what major issues will be discussed.

Arrange transportation and child care. Lack of transportation and child care can be barriers to attendance. Try to make arrangements to provide both and then mention their availability to your attendees beforehand.

Technology

Take advantage of information technology to hold meetings. Some organizations regularly use conference calls to hold meetings, especially if members are geographically dispersed. For example, a Board of Directors meeting of a national organization which has Board members in different cities may not be able to hold many in-person meetings. Also, the “information super-highway” and the Internet may help you to communicate with your members.

It has been said that the preparation of a meeting is 80 percent of the work. Once the pre-meeting tasks and responsibilities are taken care of, you are ready to call your meeting to order.

Implementation

Chairperson

Every meeting should have a chairperson whose responsibility is to assure that the meeting is adequately prepared for and efficiently run. The chairperson has the pri-

SAMPLE AGENDA

1. Greetings/Call to Order/Quorum
2. Reading and approval of the agenda
3. Reading and approval of the minutes
4. Report from Chair
5. Officers' Reports
6. Committee Reports
7. Old/Unfinished Business
8. New Business
9. Special Presentation (optional)
10. Announcements, Comments, and other Suggestions
11. Adjournment

mary responsibility of making sure that the preparation of the meeting is completed beforehand, including the location of the meeting site, setting the meeting time, and preparing the agenda. The chairperson often acts as a facilitator during a meeting. These responsibilities are discussed in the section entitled “Facilitation.”

Agenda

The meeting agenda is essentially the “heart” of a meeting. It is the schedule of events — the program — of the meeting. The agenda should be well designed and should include everything that will be covered. Items not included on the agenda may be brought up during the time allotted for “New Business.” Developing an agenda is a process, not a last-minute task. Be sure to incorporate suggestions made by executive committee members, committee chairs, and appropriate staff. When designing the agenda, there is a basic order of business to be followed. There is a set of agenda items which are generally included, although not always in the same order. A sample agenda is provided above.

Critical items should have priority and be listed first on the agenda. These may include upcoming events, current issues, and special orders. You may also find it helpful to assign time limits for each item on the agenda. This will prevent people from talking for long periods of time and will allow the meeting to end at a specified time. Keeping a meeting under a time limit is looked upon favorably by the attendees and is appreciated. Vary the order of agenda items from meeting to meeting; this will break redundancy in the order of business. You may want to consider allotting time for a major presentation, either a cultural event or a report on a current event, if time allows.

The agenda, as stated before, should not be left until the last minute and distributed to the attendees at the meeting. The agenda should be prepared, and a final draft distributed to the attendees, at least one week before the date of the meeting.

Meeting Roles

Before a meeting is held, the roles of facilitator, notetaker, timekeeper, presenter(s), and greeter should be identified. The members of the executive committee usually take one of these roles. For the most part, the role of meeting facilitator is taken by the chairperson, but an organization may want to rotate the facilitator role to provide others an opportunity to facilitate and develop leadership.

The role of notetaker is usually taken by the secretary, but some organizations may not have a secretary, so the role of notetaker can be rotated. The notetaker is responsible for making a record of the attendees of the meeting, all actions taken, and the time and place of the meeting. The notetaker is usually

responsible for compiling and distributing the minutes. Minutes are discussed later in this Bulletin.

The timekeeper is responsible for keeping the discussion of agenda items within their time constraints and for reminding the facilitator to keep the meeting moving forward.

The presenter(s) describe programs, ideas, and reports, as appropriate to the group. The presenters should be different from the facilitator/chairperson. The greeter welcomes people as they enter the meeting and identifies available seating.

Facilitation

The facilitation of a meeting has a direct effect on the participation of the members and the efficiency of the meeting. A meeting should not be poorly run or boring. The following suggestions may help make your meeting more efficient and effective.

Start the meeting promptly. The meeting should be called to order at the scheduled time. By starting the meeting exactly on time, you will make tardy members aware of your seriousness on the issue, and members should begin to come to the meeting on time.

Welcome everyone. Make a point to welcome everyone to the meeting before you proceed with the agenda. This will make members feel comfortable.

Introduce people. Ask new people to introduce themselves to the group and to answer a question, such as "What do you want to know about the organization?," or to tell something about themselves.

Review the agenda. Go over the agenda with the members, and

FACILITATION TIPS

- Start the meeting promptly
- Welcome everyone
- Introduce people
- Review the agenda
- Explain the meeting rules
- Encourage participation
- Keep to the agenda
- Avoid detailed decision-making
- Move to action
- Seek commitments
- Respect everyone's rights
- Be flexible
- Summarize meeting results and follow-up plans
- Thank people
- Evaluate the meeting

ask if anyone has suggestions or items to add to the agenda.

Explain the meeting rules. Make sure that everyone is familiar with the organization's basic rules of order for meetings. For example, if you are using Robert's Rules of Order, make sure that everyone understands how to use them.

Encourage participation. Every meeting should involve all the people attending. If some members are less participatory, ask them directly for their suggestions or opinions about an issue on the floor. Don't allow one or two people to dominate the meeting. If a few people dominate, it is less likely that others will be willing to participate.

Keep to the agenda. Meetings have a tendency to drift from the agenda. If you notice a discussion wandering off, alert the members that the group should get back to the original discussion topic.

Avoid detailed decision-making.

Don't allow a discussion to immerse itself in details. Suggest that a separate meeting be held to discuss detailed issues or that a committee be created.

Move to action. A meeting should not be a series of reports, it should also challenge members to plan ways to confront issues. Meetings should plan effective actions to build the organization.

Seek commitments. Encourage members to help with planning or coordinating an event or with preparing a report for the next meeting. You should present the message that it is an organization of "doers" and not "observers." Most people will be willing to take a responsibility, unless they have other commitments. Always make sure to note who makes a commitment, and follow-up with people who do. A good suggestion is to place the names of people who made commitments, what their commitments are, and the proposed deadlines at the top of the next agenda.

Respect everyone's rights. As the meeting facilitator, you are responsible for defending the rights of all participants. Do not allow anyone to ridicule or embarrass anyone else. Some people tend to dominate a meeting without giving others a chance to participate in discussion. This may be avoided by saying, "Let's hear from someone who hasn't spoken yet."

Be flexible. Even though you should follow the agenda as strictly as possible, the agenda may need to be altered to allow discussion of other issues and concerns that arise during the meeting, or for a break.

Summarize meeting results and follow-up plans. Before ending a meeting, summarize what actions were taken during the meeting, what issues were discussed, and what follow-up actions will be taken, as well as who is committed to those actions.

Thank people. Take a few moments to thank everyone who helped with preparation and set-up, and everyone who attended the meeting.

Evaluate the meeting. After the meeting, sit down with the other officers and key members to evaluate the meeting. Did it go as expected? What could make the next meeting more efficient and effective? Take note of everyone's comments, and value their opinion.

Follow-Up

There are two main principles to follow-up: do it, and do it promptly. Much of the work that was accomplished at a meeting can be lost if follow-up is not done quickly. By neglecting follow-up, many eager members lose interest and no longer participate actively.

Make sure that the notetaker prepares the minutes of the meeting soon after the meeting, while the events of the meeting are still fresh in everyone's minds. Other officers should review the final draft of the minutes to assure that they are clear and concise.

Make relevant reminder notes in your calendar to make sure deadlines are met, and also mark dates to contact and remind people who have particular responsibilities. Make sure that tasks and reports are prepared before their deadlines.

Minutes

The minutes are the official record of a meeting, and their value cannot be overstated. The minutes of a meeting should be prefaced by: 1) the name of the organization; 2) the date, time, and place of the meeting; 3) the name of the presiding officer or chairperson; and 4) the names of the members present (and absent).

When minutes are being taken, the notetaker should listen to all comments, write down the main points — minutes are not a direct transcript of the meeting — and summarize the discussion. Records should be brief, but as complete as possible.

Minutes should clearly indicate the major problems stated, suggestions proposed, and all main motions. Motions should state the name of the person who made the motion, whether the motion was carried or failed, and the number of votes for, against, and abstaining.

The minutes are concluded by listing the time of adjournment, the name of the notetaker, and — after the minutes are approved — the approval date.

Every meeting is important for an organization, and it should be planned and facilitated with great attention. With efficient planning, skillful facilitation, and timely follow-up, meetings can help organizations realize their full potential. Meetings play a significant role in the success of an organization in achieving its goals. Many community-based organizations rely on meetings to involve community members in working towards their goals, so make sure meetings are effective and productive.

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To join the network, or for more information about the Leadership Initiative, contact:

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