



Advisory

The Council of Ontario Directors of Education (CODE) is an advisory and consultative organization composed of the CEOs of each of the 72 District School Boards in Ontario; Public, Catholic and French Language.

Effective Meeting Management

What do I need to know about effective meetings?

In an article by Harvey Schachter, "Conquer the Meeting Myths", published in the *Globe and Mail*, he explains that "executives need to be highly selective in the meetings they attend so they can devote themselves to vision, strategy, planning and communications." [See Web Links] Directors of education and superintendents often attend an inordinate number of meetings, which can limit their ability to be dynamic and effective in improving the quality of instruction and increasing student achievement. On the other hand, education is a highly collaborative and interactive process, built on relationships. When teamwork is a goal, more work gets done in meetings. The director must decide which team processes require the director's involvement, while insisting on preserving blocks of time for the "big picture" thinking that is necessary to achieve system outcomes.

Effective meeting management includes two major components. The first is organizing, facilitating and conducting effective meetings. The second component is determining when a meeting is required and what meetings the system leader should attend.

In *Manager's Guide to Effective Team Meetings*, Barbara J. Streibel notes, "...meetings can either be the bane of an employee's life or they can help facilitate the cooperation needed to efficiently and effectively work together." She also states that in an increasingly collaborative work environment it is important to plan and conduct meetings that involve each participant, promote a strong sense of community, and (most importantly) drive the organization forward.

Generally, engaging meetings:

- provide information for team members to do excellent work;
- allow for creativity;
- contribute to staff motivation and incentive; and
- build commitment, cohesiveness and community effort toward system goals and vision.

What should I know about organizing and facilitating effective meetings?

The key aspects of effective meetings are:

Adequate Notice

It is important to provide adequate notice of meetings. Although there are some situations that require an emergency or impromptu meeting, meetings are much more likely to be successful if all participants come prepared to discuss items on an agenda.



Print Resources

The following publications provided information for this advisory and are helpful resources.

- Streibel, Barbara J. (2003). *Manager's Guide to Effective Team Meetings*. New York, NY: McGraw-Hill
- Petz, Jon. (2010). *Boring Meetings Suck*. Hoboken, New Jersey: John Wiley & Sons



Careful Planning and Preparation

1. Determine the purpose: Meetings should have a clear purpose and defined goals.
2. Identify participants: Invite only those individuals necessary to achieve the goals of the meeting. Prior to the meeting, speak directly with those individuals who will have specific responsibilities during the meeting.
3. Prepare an agenda: Consider the following questions.
 - What is the expected goal and outcome for the meeting? (e.g., Is the purpose to reach a decision, to generate ideas, or to finalize a report?)
 - How should the meeting be organized and sequenced to be most effective and efficient?
 - Is each person required for the entire meeting?
4. Allocate time: Let the purpose of the meeting determine its length. A general rule is that regular meetings should last no longer than 90 minutes. It is an effective practice to specify the amount of time for each item on the agenda. One suggestion is to indicate a start, duration and stop time for each item. Action items can be organized into three steps – providing information, discussing and receiving opinions and suggestions, and formulating a recommendation.
5. Sequence the agenda: Structuring the agenda to keep the meeting from “bogging down or diverging and the participants from heating up or burning out” [Streibel] is an important aspect of sustaining involvement and maintaining participant attention.

Effective Facilitation

1. Set ground rules: In situations where ground rules for the meeting have not been previously established, the chair or facilitator of the meeting should take a few minutes at the beginning to discuss the ground rules and respond to questions. Establishing ground rules and guidelines for participant interaction is important in developing a spirit of cooperation and a sense of community.
2. Assign roles: In one of her Monster.com articles, “Help Make Meetings Productive”, Michele Marrinan states, “We need to establish a different kind of culture where it’s up to every person at the meeting to pull his or her weight to make it work.” [See Web Links] There are a number of strategies that assist with this goal, including assigning the roles of scribe (posts key ideas, points on a flipchart or computer, and comments during the discussion), timekeeper, and note taker (records the key ideas of the meeting for a permanent record). It is effective to rotate the roles among participants as much as possible.
3. Ensure participant satisfaction: It is important for participants to have an opportunity to provide feedback and input to the agenda. This involvement can lead to a more effective meeting and a more participatory agenda. In “Running Effective Meetings: Establishing an Objective and Sticking to It”, [www.mindtools.com] there are several helpful recommendations:
 - If certain people are dominating the conversation, make a point of asking others for their ideas.
 - At the end of each agenda item, quickly summarize what was said and ask people to confirm that it’s a fair summary. Make notes regarding follow-up.
 - Note items that require further discussion.
 - Watch body language and make adjustments as necessary. Perhaps a break is needed, or you need to stop someone from speaking so much.
 - Ensure the meeting stays on topic.

- List all the tasks that are generated at the meeting and make a note of who is assigned to do what and by when.
 - There are generally four types of decisions: the director makes a decision at the end of the meeting; participants vote on the decision; participants reach consensus; or selected members are delegated to make the decision. It is very important to know in advance how the decision will be made. In the event that a decision cannot be made, the group must determine whether to continue the meeting, postpone the decision, or schedule another discussion.
4. Know how to end: Close the discussion and complete the meeting. Both of these aspects to a meeting are critical. Good meetings close on time; even better meetings finish early.
 5. Summarize what happened: Briefly review meeting results and next steps. Inform participants that you will be sending out a meeting summary.
 6. Debrief: After the meeting is over, take some time to debrief and evaluate the meeting's effectiveness based on the objectives of the meeting. Prepare the meeting summary about what was accomplished and who is responsible for which tasks as the team moves forward. The summary will be forwarded to all participants and other stakeholders. This is a very crucial part of effective meetings that often gets overlooked. You need a written record of what transpired, along with a list of actions that named individuals have agreed to perform.

When should directors schedule and/or attend meetings?

There is a tendency to "over invite" a number of people to many meetings. In the role of Chief Executive Officer and Chief Education Officer it is important for the director to identify which meetings are essential to attend. Generally, meetings that articulate a strategic direction or are intended to develop a plan that will have system implications should be attended by the director or designated supervisory officer. These meetings include executive council and administrative council. Also, directors have a key responsibility with board meetings and committee meetings.

It is important that directors do not attend meetings that are better organized and facilitated by other staff members. Occasionally a director will be asked to attend a meeting to bring greetings or make introductory comments. However, the director's presence is not essential to the effectiveness and efficiency of the meeting. Knowing when to decline an invitation and when to assign a meeting to other staff members is an important skill for directors to develop.

How can technology be used to improve meeting effectiveness?

Technology can be used for more effective meeting management for both the corporate board and the system.

The Corporate Board

In a recent CODE survey, it was noted that currently:

- 7 boards are conducting paperless meetings;
- 6 boards are conducting meetings which are paperless. However, upon request, the boards provide hard copies of materials to members of the board; and
- 5 boards are investigating paperless meetings.

The survey responses indicated that generally smaller, rural and more remote boards are engaging in paperless meetings.

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Web Links:

<http://www.theglobeandmail.com/report-on-business/managing/morning-manager/conquer-the-meeting-myths/article669777>

[Harvey Schachter article, “Conquer the Meeting Myths”]

<http://career-advice.nytimes.monster.com/in-the-office/workplace-issues/Help-Make-Meetings-Productive/article.aspx>

[Michele Marrinan article, “Help Make Meetings Productive”.]

<http://managementhelp.org/misc/meeting-management.htm> [Free Management Library site, “Guidelines to Conducting Effective Meetings”]

<http://www.mindtools.com/CommSkill/RunningMeetings.htm> [Mind Tools article, “Running Effective Meetings”]

In the *Education Act* (section 208.1) and Regulation 463/97 Electronic Meetings, there is a provision for boards to conduct their regularly-scheduled meetings by electronic means. In order to conduct paperless and/or electronic meetings, boards should have in place a by-law, policy and procedures and provide the requisite equipment to the trustees and senior staff in order that meetings are effective. It can be challenging to ensure active participation and engagement in an electronic environment.

The System

Many school systems are currently in the process of exploring the use of technology for more efficient meetings. Teleconferences have generally been the major method by which technology has been used.

There are disadvantages to teleconferences, which include limited participation, inability for face-to-face discussion and dialogue, lack of interactive information, and time restrictions. Other options include virtual meetings through:

- Video conferencing;
- Web-Ex;
- Adobe Connect;
- Texting;
- Document Sharing;
- Online Collaboration; and
- Podcasts.

Virtual meetings can eliminate costs and travel time, reduce the loss of time and interruption of work, and can link together a number of people separated by space or time. Some suggest that virtual meetings are more productive, sharpening the focus of discussion and defining the purpose of the meeting. However, virtual meetings are often less effective for larger groups, when a wide range of discussion is required, and when there are strong feelings and attachments to a particular topic or decision.

If as a supervisory officer, I have concerns and need assistance, what should I do?

- Attend an executive seminar on effective meeting management, or search the internet for relevant articles.
- Speak with colleagues who have significant experience in the role of director and manage meetings effectively.
- Enlist the support of the Council of Ontario Directors of Education (CODE).
- Review meeting strategies with your senior leadership team and with the board chair.
- Contact boards that are conducting paperless meetings.

