

## What Kind of Meeting Should I have?

<p><b>IN GENERAL do not have a meeting if it is possible to ==&gt;</b></p>	<ul style="list-style-type: none"> <li>• deal with the issue in a few (1 to 3) one on one or one on two sessions</li> </ul>	<ul style="list-style-type: none"> <li>• have people commit to action as part of their day to day work activities</li> </ul>	<ul style="list-style-type: none"> <li>• take care of the item or issues as part of normal day to day routine and procedure</li> </ul>	<p><b>IN GENERAL do not use a formal process or process facilitator when ==&gt;</b></p>	<ul style="list-style-type: none"> <li>• the "how" to be used is well understood by all attendees</li> </ul>	<ul style="list-style-type: none"> <li>• the individuals have a history of working well together</li> </ul>
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What is the purpose/outcome for this meeting	What is this being handled in this meeting	Who needs to be involved in this meeting	When should the meeting be held	What "group process" is relevant (examples)	When would you use a process facilitator	What kind of material should be included in the documentation
1 To set an objective	<ul style="list-style-type: none"> <li>• a joint meeting which about planning produces integration of action</li> </ul>	<ul style="list-style-type: none"> <li>• the objective "demander"</li> <li>• the individuals who are accountable for seeing that the objective is accomplished (either personally, or their staff - level of attendees be roughly peer)</li> </ul>	<ul style="list-style-type: none"> <li>• when an objective needs to be set</li> </ul>	<ul style="list-style-type: none"> <li>• strategic planning cycle</li> <li>• mission, csf, roles, &amp; responsibilities</li> <li>• gap analysis - what should be minus what is = the gap to be addressed</li> </ul>	<ul style="list-style-type: none"> <li>• new group - no history of working well together</li> <li>• objective setting a new activity for this existing group</li> <li>• group members having difficulty working together</li> <li>• new "leader" and existing group</li> </ul>	<ul style="list-style-type: none"> <li>• transcript of the main common objectives, missions, csf's, etc documented as complete English sentences, as quickly as possible during or following the meeting</li> </ul>
2 To define a problem	<ul style="list-style-type: none"> <li>• a number of people need to agree on what the problem is, so that solutions are evaluated against a common understanding of what is wrong</li> </ul>	<ul style="list-style-type: none"> <li>• the individuals responsible for improving things in a given area or situation of concern (either personally, or their staff - level of attendees should be roughly peer)</li> </ul>	<ul style="list-style-type: none"> <li>• whenever an area of concern persists despite of efforts to "fix" it, especially when such efforts do not get off the ground, or fail</li> </ul>	<ul style="list-style-type: none"> <li>• the SCORE model: classify events and items under following headings:                      .==&gt; Symptoms                      .==&gt; Causes                      .==&gt; Outcomes                      .==&gt; Resources                      .==&gt; Effects</li> </ul>	<ul style="list-style-type: none"> <li>• new group - no history of working well together</li> <li>• previous attempts to work together have failed</li> <li>• individuals involved have a history of unresolved conflict</li> </ul>	<ul style="list-style-type: none"> <li>• transcript of results</li> <li>• statement of action responsibility (what, who, by when)</li> </ul>

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3 To solve a problem	<ul style="list-style-type: none"> <li>the problem is complex enough (either technically or organizationally) to require the kind of quality and commitment to the solution that can only be achieved through group work</li> </ul>	<ul style="list-style-type: none"> <li>the individuals who will "accept" the final solution as "valid" and "relevant" to the problem, or their hand chosen representatives or delegates</li> <li>the best expertise which currently exists in the problem area</li> <li>"problem area" experts from outside the organization who have no stake in any of the possible solutions (especially if previous solutions have failed)</li> </ul>	<ul style="list-style-type: none"> <li>when a clear statement of the problem exists</li> <li>when this statement has been accepted by the individuals accountable for area in which the problem exists and their behaviour clearly shows that they are prepared to "implement" a solution</li> </ul>	<ul style="list-style-type: none"> <li>solution generation processes (e.g. brainstorming ; eliminating resource &amp; organizational structure constraints, "in the ideal case .....)</li> <li>solution evaluation processes (e.g. strength and weakness analysis, relating possible solutions back to csf's, roles, missions, objectives, formal multiple criteria evaluation methods, simulation, best and worse scenario generation.....)</li> </ul>	<ul style="list-style-type: none"> <li>new group - no history of working well together &amp; the problem content is complex</li> <li>solution generation and evaluation procedures are such that experience in the procedure itself is itself key to good solutions</li> <li>solution generation &amp; evaluation require adherence to methodology which is new to group</li> </ul>	<ul style="list-style-type: none"> <li>document giving all rejected solutions showing why</li> <li>document giving all accepted solutions, showing their relative evaluation and rank</li> </ul>
4 To plan the implementation of a solution - to plan action	<ul style="list-style-type: none"> <li>a number of people need to agree on who does what when and how</li> <li>action needs to be coordinated among more than 2 people because of task interdependency</li> </ul>	<ul style="list-style-type: none"> <li>the individuals who are going to carry out, or have carried out, the action plan (i.e. the doers, or the direct supervisors of the doers)</li> </ul>	<ul style="list-style-type: none"> <li>the solution to a problem or the need to act is accepted by all of the individuals and the only issues left are "HOW" and "WHEN" and "WHO"</li> </ul>	<ul style="list-style-type: none"> <li>standard project management methods                             <ul style="list-style-type: none"> <li>==&gt; work decomposition</li> <li>==&gt; resource needs estimates</li> <li>==&gt; elapsed time estimates</li> <li>==&gt; responsibility assignments</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>new group - no history</li> <li>previous attempts to work together have failed</li> <li>individuals involved have a history of unresolved conflict</li> </ul>	<ul style="list-style-type: none"> <li>the action plan showing what, when , who</li> </ul>

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5 To get approval	<ul style="list-style-type: none"> <li>• all of the approvers (and potential blockers) need to see that the approval is granted in a public "visible" way</li> <li>• those responsible for accomplishing what is approved are "empowered" in public</li> </ul>	<ul style="list-style-type: none"> <li>• the individuals who can "approve" (and those who can block)</li> <li>• those individuals who need to be empowered by the approval</li> <li>• those individuals who can most effectively and credibly present what is to be approved</li> </ul>	<ul style="list-style-type: none"> <li>• whenever "approval leading to visible empowerment" is required</li> </ul>	<ul style="list-style-type: none"> <li>• effective presentation</li> <li>• normal rules of effective group participation:               <ul style="list-style-type: none"> <li>...one person at a time talks</li> <li>...complete one topic before moving to the next one</li> <li>...start and stop at specified times</li> <li>...every one in the room at all times during the meeting</li> </ul> </li> <li>• normal preparation and planning:               <ul style="list-style-type: none"> <li>... circulate relevant documents days in advance</li> <li>...circulate agenda clearly indicating decisions to be made</li> <li>...pre-brief decision makers if issue is "difficult"</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• only in case of extreme conflict</li> <li>• normally the meeting chair provides all process structure needed</li> </ul>	<ul style="list-style-type: none"> <li>• the approval or decision as made including any follow up or review conditions</li> <li>• as quickly as possible</li> </ul>
6 To inform a group	<ul style="list-style-type: none"> <li>• broadcast information to a number of people who need to know</li> </ul>	<ul style="list-style-type: none"> <li>• the individuals whose presence will give the "information" which is broadcast credibility</li> <li>• individuals who are effective "transmitters" of information to various sizes of groups</li> <li>• the individuals who are there to "receive" the information</li> </ul>	<ul style="list-style-type: none"> <li>• as needed in the perception of the individuals who want to have the information broadcast</li> </ul>	<ul style="list-style-type: none"> <li>• effective 1 to many information presentation and broadcast techniques including the use of color slides, multi-media and other technology</li> <li>• specified times for start and stop</li> </ul>		<ul style="list-style-type: none"> <li>• hand outs which people can take away and refer to immediately after the meeting</li> </ul>

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7 To have individual inform each other of "status"	<ul style="list-style-type: none"> <li>• a number of people all need to be "up to date" on the status of action items or on-going work</li> </ul>	<ul style="list-style-type: none"> <li>• a chair who controls the progress / process of the meeting</li> <li>• the individuals who need to be informed</li> </ul>	<ul style="list-style-type: none"> <li>• usually a "regularly" scheduled event</li> <li>• otherwise as needed</li> </ul>	<ul style="list-style-type: none"> <li>• a regular sequence of report out and "ask" questions for clarification activities</li> <li>• a process for referring issues and items to individuals for follow up action</li> <li>• a process for "stopping" discussion and moving it to another meeting which is planned and managed as an action item from this meeting</li> <li>• specified times for start and stop</li> <li>• if group meets regularly an informal agenda can be developed in the first few minutes of the meeting</li> <li>• otherwise an agenda with suggested times is important</li> </ul>	<ul style="list-style-type: none"> <li>• not normally - chair is process facilitator</li> <li>• an agenda which indicates who is to be present to talk about what for how long will do much to establish the "process" needed for the meeting</li> </ul>	<ul style="list-style-type: none"> <li>• an action list indicating who, what by when (if possible immediately at the conclusion of the meeting)</li> </ul>

  

**Good "Norms"**  
(Normal Practices)  
for all types of meetings

normal rules for effective group participation

- > only one person at a time talks
- > complete one topic before moving onto the next one
- > start and stop at specified time
- > every one in the room at all times during the meeting

**Good Practices To Follow Before all Meetings**

normal preparation and planning

- > circulate relevant material days in advance
- > circulate agenda clearly indicating decisions to be made
- > pre-brief decision makers if issue is difficult or complex