# MEETING MISCELLANY*

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Members and leaders of organizations share a popular misconception about why meetings are successful. The mistaken idea is that when a meeting goes well it's because the person running it is uniquely gifted. It's often thought that some people, without any special effort, have a skill for creating meetings that are productive, exciting, and fun. Although the notion has a grain of truth, the critical fact is that when an organization's meetings are consistently successful, it's because key people understand basic principles and put them into practice with attention to detail.

### *Formal & Informal*

A widespread and basic misunderstanding on this subject stems from ignorance about the functional differences between formal and informal meetings. It's a source of confusion, inaction, and fragmentation.

Typically, meetings are called after people experience a problem, only to discover that they can't agree on common action. This "leap and languish" situation occurs because these *formal* meetings are convened too quickly, before *informal* exploration of the problem in which potential solutions aren't rejected to save face, protect turf, or sustain prior commitments.

Informal meetings, especially one-on-one, are particularly good for discovering and developing points of view. When people meet informally they're much more likely to create and explore a variety of perspectives and proposals for action. Also, since informal meetings tend to be smaller, they're better settings for working out details. On the other hand, informal meetings aren't well suited to making clear-cut, binding decisions that are widely owned. It's in formal meetings that people can best lay out their previously determined points of view and then make binding decisions for action.

Leaders and staff should understand that to go from the discovery of a problem to a fully developed and approved action plan, based on "collectible commitments," requires a series of meetings. It begins with informal meetings to explore ideas, and leads to formal meetings to make decisions and launch action. Attempts to short-circuit these steps inevitably lead to immobilization from disagreement on values, goals, methods, tasks, or division of labor.

DYNAMICS OF FORMAL AND INFORMAL MEETINGS

| | Discovery & Development | Display & Decision-Making |
|---|---|---|
| ***Function Questions*** | ***Informal Meetings*** | ***Formal Meetings*** |
| Why meet? | Exploration of problems | Decision-making and action on known issues and interests |
| Who should meet? | Exclusive—goal is minimum practical number | Inclusive—goal is maximum practical number |
| What should be considered? | Broadly-defined problems | Narrowly-defined issues |
| What should be the meeting ground-rules? | Casual informality | Parliamentary procedure |
| When and where should the meeting be? | Determined by interests and convenience | Determined by power-oriented negotiation |

### *Building Platforms for Action*

While a meeting agenda may include several items, each meeting has a main purpose. The best meetings are platforms for action. In meetings that lead to tangible gains and build the organization, we decide on and plan action to resolve an acute or chronic problem or issue. These are the best "coming attractions" to multiply turnouts at future meetings. We also do well, albeit with less excitement, in meetings that *decide on and plan a project* that stimulates community consciousness among mem-

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bers, a feeling of group solidarity and accomplishment.

In meetings that maintain internal processes or goals, such as annual elections or approving the budget, the business is often unexciting, regarded at best by most members as a necessary obligation. I remember one president who for weeks earnestly repeated an announcement of an upcoming board meeting at which new bylaws were to be approved. Each time he would plead for attendance because of a quorum requirement; each time the members displayed disinterest, if not outright disdain, at the acknowledged prospect of a long and boring meeting.

The obvious point is that the lifeblood of an organization is action and accomplishment. It's the possibility and subsequent realization of success that attracts people to meetings and keeps them coming back. It's as Alexis de Tocqueville said in the 19th century when describing the loyalty of New Englanders to town-meeting government. Their attachment wasn't from habit or sentiment but because the town government was strong and independent, with authority and inclination to act, and it deserved the stewardship and sagacity of every citizen. It's the absence of action and practical achievement, the thought of endless, useless talk, which discourages participation.

Agenda items and our approach to them should always convey the serious purpose of the organization, showing both the competence and integrity of the members. If our business and how we conduct it is pointless, frivolous, or somehow superficial, it's naive to think others will regard the organization as worthy of their commitment.

Even in organizations with a serious purpose, meetings must be fun, as well as efficient and effective. Attitudes and activities of leaders should set an example that encourages members to enjoy themselves in meetings. Having fun doesn't mean we're irresponsible, only that we don't take ourselves too seriously.

Good turnouts and active participation also require that leaders and professional staff serve both organizational and individual needs. Members should be asked directly to make explicit job commitments, to be called in later, so neither they nor the organization relies on vague promises. When asking for and accepting commitments, attention should be given not only to individual potentials but also to prior demands and obligations, to avoid treating people as organizational cannon fodder.

Good meetings almost never last longer than 90 minutes or have more than three important agenda items. When it seems unavoidable that the agenda and meeting time be longer, consider a second meeting, committee action, farming out the job, or rethinking priorities.

Successful meetings have agendas that are proposed and owned by the people in attendance. Almost everyone has sat through a meeting in which the main business was "sent down by the New York office" or something "we should consider because our past president thought it was a good idea." Meeting business should belong to those present, the agenda reflecting their concerns and commitments. It shouldn't be surprising that attendance dwindles when this isn't the case.

Apart from these general principles, there's a long list of "personal" reasons that people have for attending meetings, including those of religious organizations. Many attend regularly only because they enjoy the social contact. Others are motivated by a desire to protect or promote their communities, to take leadership or other special roles, to fill needs for esteem, status, or a sense of belonging, to gain direct benefits, or to keep informed. On the negative side, some members attend meetings to obstruct action, to promote covert internal political agendas, to press for programs that serve their narrow personal interests at the expense of the organization's general well-being, to work out emotional neediness, or simply to socialize with the opposite sex.

Members and staff probably have more direct control over chairing than over any other variables affecting meetings. Further along we'll consider several ways to improve chairing.

While substantial organizational resources may go into meetings and programs, preparation and review of these activities are often misunderstood and mismanaged. Yet over the long haul, planning and evaluation may be the most critical factors in success or failure. In the next and last sections we'll look at meeting briefings and follow-ups.

### *Briefings*

An important factor in successful meetings is premeeting briefings between professional staff and leaders. Professional staff members often think that the goal in preparing with leaders for meetings is to lead them to the same understandings that the staff person has on a problem, issue, policy or program. The effect of this approach is to gain short-term organizational mileage but to undermine long-term leadership development. It has organizational staff asking manipulative questions to which they have in mind correct answers. It also creates within the culture of the organization the "Boy Scout syndrome," the impression that "older leaders are being led around by youthful staff." This perspective has been conveyed to me several times by both leaders and sympathetic outsiders.

I don't imagine that the difficulty arises because staff members aim to manipulate or unduly control but because there's a lack of clarity about how to help leaders and the membership reach a level of necessary insight and action. In short, it seems a matter of ignorance rather than intention.

The alternative to asking set-up questions or to spoon-feeding answers is to *repeat aloud to leaders during briefings the same questions* that *staff asked themselves* to arrive at their understandings. We should engage leaders and members in thinking about the right questions, not agreeing to the right answers. Of course, there's the possibility that because of differing experiences, realities and interests, leaders and staff will reach different conclusions and formulate different strategies and tactics.

While there are risks in this approach, it has several advantages to recommend it. It's the shortest way to engendering committed leaders, and it's the best hope for building leadership in depth. Moreover, the risks can be controlled. If most of the formal and informal leaders have meaningful parts in devising action plans, the likelihood that any misguided individual will dominate is greatly diminished.

While it may seem contrived, even Pollyanna-like, and often it's not the case, I try to begin briefings with positive organizational news or by talking about a critical problem facing the organization. Leaders are energized by positive rewards (the good news) and challenges (the problems). It's a mistake to approach a briefing with the assumption that the leader or member is sufficiently motivated by the necessity or importance of the job to be done.

There are several general themes to be discussed in pre-meeting briefings—to wit: broad, hoped-for outcomes and specific objectives for the meeting; the field of action external to the organization, insofar as it's relevant; the internal organizational context, that is, the dominant resources and realities that will affect outcomes; the sequence of the meeting or its agenda development, and the transition from one item to another; expectations regarding players, their specific objectives and methods; potential problems requiring informal leadership, and who will play the necessary parts; and linkage of the meeting to prior and future organizational activities in an ongoing process, program, or campaign.

One of my briefing objectives as a staff member is to develop as much information and insight as possible about the implications of the agenda items, but without promoting a particular decision or becoming argumentative. My starting point for each item to be covered is to decide whether to move the talk by asking a question, proposing alternatives, or making a statement. The decision hinges on several things, not the least of which is how much my leadership is required. So I have to ask myself, to what extent is my leadership appropriate or necessary, and what form should it take? To determine that, I have to consider ahead of time—or answer on my feet—the question, what intellectual resources, social experiences, and organizational skills does this person have?

Obviously there are many judgment calls to be made based on situational circumstances. I've suggested elsewhere the criteria for leadership by professional staff: All such leadership should be conscious modeling to encourage others to take similar leads. It should always be sensitive to the goals of building ownership, knowledge, and skill among leaders and members. It should focus first on process. It should never usurp decision-making. It should rarely be the organization's public voice. It should never be embodied in formal (elected) office.

Ordinarily the most complicated pre-meeting briefing involves the chairperson and often takes more than one session, depending on the person's experience and sophistication. On the first contact, after the amenities are concluded, for the novice I offer a general picture of what chairing entails and give assurances of my support. From there we plan an agenda. A second visit is essential for going over principles of good chairing (some of which are reviewed in the next section), or reviewing with old-timers, past problems and methods to deal with them. The technique is to role-play the meeting. Of course, these sessions are combined or expanded as needed.

My actual preparation of the chair begins, then, with the layout of the agenda for the meeting. I open by asking, "What are the key things that you want to happen at the meeting?" Together we refine the list, making additions, deletions, and other changes. In this session we cover style as well as substance. The range of subjects covered includes: introductions—asking people to give both their name and a brief "personal" statement, varying in content with the purpose of the meeting; verbal "sign-posting" of the meeting as it goes along, so there's a sense of accomplishment, direction and progress; and, "shifting gears"—ensuring smooth transitions, such as moving from the discussion of a problem to talk about an action plan and the jobs to make it happen.

The role-playing preparation lays out several possible problems and how they can be managed. I ask the chair, "How would you want to deal with that?"—say a situation in which someone questions why it's necessary to bother with research before taking action or questions why an alliance with an "outside" group is needed by the organization. We discuss various responses, and after trying to figure out who'll be at the meeting, we briefly role-play how to deal with them as individuals.

There also should be role-playing to blunt the natural inclination of many leaders to define organizational situations in "we-they" terms, doing things like *personally* welcoming people to meetings or thanking them for taking on or finishing a job—as if the members acted to please the leader, rather than everyone working together for their common interests. Statements of solidarity and celebrations of fellowship, with shows of organizational appreciation, are much more useful.

Lastly, the chair should be prepped to avoid exhortation—all variations of "you really oughta wanna"—for gaining interest and participation. The alternative to berating people for not satisfying our expectations, a habit that only builds resentment, is to pull them into finding solutions. So instead of saying, "You people have to come to more meetings if this organization is going to succeed!" the leader asks, "How can we get more people out for and involved in our meetings?"

### *Chairing*

Once a meeting is convened, the quality of chairing—first and foremost—influences its success or failure. Good meetings demand that the chair exert *absolute but flexible management*. Nothing occurs in the meeting that the chair hasn't consciously allowed, but for a variety of reasons many departures from formal parliamentary procedure or other guidelines may be okay, even occasionally encouraged. Good meetings require also that the chair provide opportunities so that everyone may talk—but not endlessly. Obviously, there's no way to avoid cutting off some long-winded speakers, yet sensitive chairing dictates that this be done with warmth and humor, not autocratic discipline. A particularly deadly characteristic of poor chairing is the tendency both to raise and answer all questions, droning on with a pompous lecture rather than inviting and encouraging others to talk.

Control often requires interrupting and cutting people off. This is accomplished by letting a gavel rather than an individual's voice do the interrupting. If the offending speaker is way out of line, the gavel is banged forcefully. If it's only a minor digression, a light tapping does the trick. The call to order is a statement, not a question: "The meeting *will* come to order!" instead of "*Will* the meeting come to order?"

A common mistake made in meetings is when the chair becomes an advocate for some policy or program or decision of the organization or its leadership. There's a tendency, especially for new officers, to respond personally to vocal critics. When the chair becomes an advocate, attempting to answer or stop all criticism, the result is loss of credibility as a neutral moderator, exclusion of others from explaining the organization and owning those explanations, and widespread resentment for abuse of the chairing power.

The antidote to advocacy chairing is preparation that teaches how to handle criticism or threatening ideas, mainly by turning them back to the membership. Under such circumstances, the chair asks, "How do others feel about that?" or "Are there any other points of view?" (Of course, the practice of a chair turning hostile or difficult questions back to others in the room only works well if there are other, informal leaders prepared to speak up.)

The chair has two basic "mechanical" tools, the agenda and the gavel. The agenda in a competent democratic organization reflects an explicit agreement about the business to be covered by those present. Its formulation and approval should be done with conscious communication and decision. Like the gavel, the agenda is an instrument of meeting management. Although interrupting people isn't particularly enjoyable, the chair may get some consolation from knowing that almost everyone else in the room, except the person who's out of order, appreciates the chair's initiative. They're also annoyed or bored and want to move on, so they're usually thankful when the chair takes charge and pushes the agenda.

### *Reviews & Evaluations*

Professional management demands that meetings, programs, and other activities be reviewed and evaluated. The starting point is turnout data—who showed and who didn't. It requires not only a simple count but also summarizing ratios of ethnicity, men to women, newcomers to regulars, leaders to members, issue divisions, and internal factions.

These are followed by basic organizational questions: What did the meeting or other activity reveal about the *general* state of the organization, program, policy, leadership, etc.? Did the overall "gestalt" lend basic insight? Did it advance or retard accomplishment of instrumental purposes? What were the process accomplishments of the meeting? Was the chairing appreciably improved, or the budgeting process?

Taking the questions one at a time, what were the general strengths of the meeting and what were the general weaknesses? There may be a good deal of overlap with the prior questions on instrumental and process achievements, but focusing on this question provides an opportunity to cover points that don't fit naturally into those categories. For instance, shortcomings in planning and preparation, choice of location, or lack of relationship among those in attendance, may be noted here.

The action question is, what kind of follow-up needs to be done with individuals? This includes reviewing the activity with formal and informal leaders who were present, doing callbacks on nonmembers that attended, and updating members and leaders not present. Follow-up includes communications with outside supporters, as well as political targets, and media releases and confirmations, both internal (organizational newsletter) and external, plus groundwork for upcoming activities.

The format for reviewing meetings and other activities with leaders and members is very similar to what we should do initially for ourselves as professional staff. The main goal is to get individuals to look in a critical but constructive way at their performances.

I begin this by building organizational culture through setting expectations, initially about my role in the review process. I explain that our talk isn't gossip but essential for the organization to evaluate its strengths and weaknesses. I emphasize two points: It's *my job* to talk with people about what they think went well and what went poorly. And to make it clear that mistakes are inevitable—everyone makes them—but repeating them is not! The only problems that can't be cured are the ones we won't talk about. I pass on to each person what others have told me. I tell them that I'll pass along their ideas to others and encourage them to do the same.

Healthy organizational culture supports open discussion of problems, not to find fault, but as supportive spirit- and skill-building activity. Thus questions and discussion in the evaluation should focus not only on the individual's strengths and weaknesses, but the potential for growth and a plan to improve morale and upgrade knowledge and skills. The strategy is first to encourage the leader or member to look generally at the meeting, then to look at the strengths and weaknesses of others, and finally to examine their own performances.

I encourage this talk with a series of evaluation questions. For each question I solicit the person's thoughts and feelings. When answers are reflective, informed, and reasoned, I confirm them, adding points as appropriate; when answers are defensive, irrational, and unreflective, I immediately and unequivocally (but in a friendly and respectful way) pass along more insightful and critical responses of others, again adding my own ideas as needed.

This process, which typically occurs over a period of days or weeks, sometimes months, begins then with a definition of the professional's role in the evaluation or review, moves to setting expectations about the organization's culture, and leads from general to specific talk about an individual's "performance" in a particular meeting or activity.

The goal is to get everyone talking freely about their strengths and weaknesses, with a readiness to both hear and make suggestions and take corrective actions. We get people to that place step by step.