

## Working in Groups – Planning and Running Effective Meetings

This training provides concepts and activities designed to help AmeriCorps, VISTA and Senior Corps members work effectively in groups – with other members, consumers or community members served, staff of the host agency or other community organizations and community residents.

### Introduction

Most organized activities are done in groups, so one of the most critical requirements of AmeriCorps member training is that it helps members understand and apply basic concepts of group dynamics and strengthen their group-process skills.

Helps members understand the importance of group work in carrying out complex activities. Groups are especially likely to be involved in planning and organizing; an event like the Special Olympics occurs only once a year, but groups work year-round to plan and prepare for it. The concepts described here can be applied regardless of the subject matter. The ability to function effectively in a group helps members succeed in almost any kind of professional, volunteer, or social activity.

### Facilitator Instructions

<b>Skills Needed:</b>	Facilitation skills Familiarity with group process issues
<b>Time Required:</b>	1 hour
<b>Materials Needed:</b>	Member Instructions Meeting Planning Worksheet Cooperative Group Roles Chart posted on flip chart paper
<b>Learning Objectives:</b>	At the end of the activity, members should be able to: <ul style="list-style-type: none"><li>• Identify meeting objectives.</li><li>• Describe important logistical concerns in planning a meeting.</li><li>• Describe important ‘content’ considerations in planning a meeting.</li><li>• Demonstrate skills in meeting planning.</li></ul>
<b>Skill Development:</b>	Group-problem solving skills Planning and organizational skills

**Directions:**

Divide members into cooperative learning groups\*, preferably with 5 members each. Review the *Member Instructions on page 4* with the full group.

*\*A learning process that provides a series of structures and processes that rely on mutually supportive work in groups or teams rather than individual, competitive methods of teaching or training. Cooperative learning structures are inherently interactive and experiential. Based on research indicating that cooperative structures are superior to competitive methods for problem solving and that most adults and most minorities are more comfortable and learn better in cooperative groups. Principles include positive interdependence among participants, individual accountability for learning, equal participation for all participants, and simultaneous interaction of multiple groups.*

Once everyone is in a group, introduce the importance of meetings as a way of getting things done. Meetings, formal and informal, are among the most used activity in organizations. Most members are likely to spend a lot of time in meetings, and may have important roles in planning or chairing them.

Emphasize that meetings are most likely to be productive and efficient if they are carefully planned, accompanied by appropriate materials, and effectively chaired and facilitated.

Explain that this exercise or activity is designed to provide members with a checklist for meeting planning, and practice in using it.

Ask members to review the situation provided and the questions on the Meeting Planning Worksheet. Ask them to spend about 5 minutes on this task. Tell them when this time is up, and ask them to work for about 20 minutes to complete the worksheet.

When the time is up, bring all the Presenters to the front of the room as a panel. Ask them to summarize their plans from the worksheet, question by question. Have one Presenter take the lead for each question, and others indicate differences in their plans and the reasons for them. This should take about 15 minutes.

When the presentation has been completed, do some **processing**; ask members how the experience went, what they found difficult, whether the worksheet included considerations they might not have thought of without it. Then ask how they think the meeting might go; what might be the difficulties. **Generalize**; ask what they think are typical needs and problems in meeting planning and coordination. See if they can **apply** what they have learned; ask how they think they can use this approach in their AmeriCorps assignments. Allow about 15 minutes for this discussion.

**Variation:**

Develop several different scenarios based on different kinds of AmeriCorps assignments in your organization. If two groups work on each scenario, have them present to each other, and then bring the full group together for a summary discussion. Be sure there is a facilitator with each pair of groups.

## **Member Instructions**

### **Assignment:**

To plan a meeting which can successfully address specific needs.

### **Directions:**

Once in a group, decide on the roles for group members, choosing from the *Cooperative Learning Roles Chart, page 5*. Read the following scenario. Work alone for 5 minutes and then take about 30 minutes to plan the meeting by answering the questions on the attached *Meeting Planning worksheet, page 6*.

### **The Situation:**

You and four other members are assigned as senior tutors to a tutoring project involving a partnership between an elementary school and a community-based organization. The school refers to the project students in grades four and five who meet certain criteria – grades below C, sharp reduction in school performance, high level of absenteeism, behavior problems, family crisis, etc. – and tutors provide individualized assistance and try to develop a big brother/big sister relationship with the students. Ten of the tutors are college students from the community who work for the organization as part-time, paid personnel. Currently, the project is serving 30 students – two per tutor. The emphasis in the tutoring is on reading, math, and communication (written and spoken).

One of the concerns of the program is the lack of parental involvement. You have a parents committee, but only four or five parents participate. You have decided that parents need to support and assist with the tutoring process by going over the student's tutoring plan, having their children read to them, reviewing and signing school assignments, meeting with the tutor periodically at the organization's offices or their homes, and otherwise becoming familiar with and involved in the tutoring process.

You aren't sure how best to structure the parent component, so you decide to have a meeting involving school personnel, parents, and project staff including members and tutors. You also want to get ideas from another tutoring program across town that has an effective parent component; that project works with high school students.

You – the five members – have been assigned by the Program Leader to plan the meeting.

*(Source: Mosaica for AmeriCorps, Starting Strong, A Guide to Pre-Service Training)*

## Cooperative Group Roles Chart

<p><b>LEADER</b></p> <p>Makes sure every voice is heard</p> <p>Focuses work around the learning task</p> <p><i>Examples:</i></p> <ul style="list-style-type: none"> <li>• “Let’s hear from _____ next.”</li> <li>• “That’s interesting, but let’s get back to our task.”</li> </ul>	<p><b>RECORDER</b></p> <p>Compiles group members’ ideas in an organized sequence</p> <p>Writes on the board for the whole group to see during the presentation</p> <p><i>Examples:</i></p> <ul style="list-style-type: none"> <li>• “I think I heard you say _____; is that right?”</li> <li>• “How would you like me to write this?”</li> </ul>
<p><b>TIME KEEPER</b></p> <p>Encourages the group to stay on task</p> <p>Announces when time is halfway through and when time is nearly up</p> <p><i>Examples:</i></p> <ul style="list-style-type: none"> <li>• “We only have 5 minutes left. Let’s see if we can wrap up on time.”</li> </ul>	<p><b>PRESENTER</b></p> <p>Presents the group’s finished work to the class</p> <p><i>Examples:</i></p> <ul style="list-style-type: none"> <li>• “How would you like this to sound?”</li> </ul>
<p><b>MONITOR</b></p> <p>Briefly leaves the group (if necessary) to get supplies or to request help from the facilitator when group members agree that they do not have the resources to solve the problem.</p> <p><i>Examples:</i></p> <ul style="list-style-type: none"> <li>• “Do you think it’s time to ask for additional help”</li> </ul>	

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## Meeting Planning Worksheet

1. What are the meeting's desired outcomes?
2. Who needs to attend?
3. Who needs to be consulted in meeting or agenda planning?
4. What should be on the agenda?
5. When should the meeting be held – day of week, time of day?
6. Are special facilities or services needed (parking, childcare, breakout rooms)?
7. Where should the meeting be held, so that the location is maximally accessible and the facility appropriate for this kind of meeting?
8. Is equipment needed, such as audio or visual aids? Will attendees need to conferenced in?
9. What information should be prepared and circulated before the meeting?
10. What kind of meeting will this be – formal, informal, or something in between?
11. What sort of meeting record is needed – minutes? Notes? A record of action taken? Is secretarial help needed, or can the participants handle this function?
12. Will any participants require a pre-meeting briefing?
13. Are refreshments needed?
14. Identify any other special concerns or considerations.

*(Source: Mosaica for AmeriCorps, Starting Strong, A Guide to Pre-Service Training)*

## Additional Resources:

### Tips for Effective Meetings

#### 1. **Arrange for a convenient and well-equipped location.**

- A meeting will be more pleasant and better attended if it is in a convenient location in terms of distance to be traveled by meeting participants, accessibility to public transportation, availability of parking, attractiveness of facilities, and safety (especially for evening meetings).
- The room should be reasonably quiet.
- There should be a table big enough for everyone to sit around or some other practical arrangement. Chairs should be reasonably comfortable; be sure there are a few extra in case some unexpected participants can hand-write their own.
- If everyone doesn't know each other, large name cards should be prepared for participants. Provide a sheet of white paper and a marker and participants can hand-write their own.
- Provide amenities: Provide pads, pens, and easel pad and markers. Be sure copying facilities are available. Plan for AV and electronic needs. For example, if attendees are calling in make sure there is conferencing connectivity.

#### 2. **Be sure the meeting has a written agenda including time frames and responsibilities.**

The single most important way of keeping a meeting "on track" is to have - and follow - a detailed written agenda. Each item on the agenda should be accompanied by a time frame (starting and ending time), an indication of who will make a presentation or lead the discussion, and a specification of any action items.

#### 3. **Be sure necessary supporting materials are available.**

This may include minutes from the prior meeting and other written materials needed as background. Where possible, they should be mailed out along with the agenda, for review before the meeting. If materials are not sent out ahead, set aside 15 minutes before the meeting so participants can review the materials and become familiar with them.

#### 4. **Identify a chairperson who is an effective facilitator and be sure that person is well-briefed.**

You want someone who will encourage participation, ensure open dialogue, monitor time, understand meeting procedures, and keep the process moving. Prepare the chairperson by identifying key topics and information that need to be covered; identify any issues where controversy is likely.

#### 5. **Be sure you participate effectively, especially when you have a position on a controversial issue.**

Let others speak first and make their case. Listen carefully; opponents may help you identify aspects of the issue you had not considered. Summarize their views, and present your own. If you know that someone else shares your view, let that person speak first, then support their strong points and add any points they may have missed. Always appear reasonable: keep a sense of humor. If you lose control, you will probably lose the argument. Don't give uncertain information; promise to find and provide the information quickly.

#### 6. **Use an agreed-upon decision-making process. Debate can be kept orderly and a fair process assured by using a single authority for meeting proceedings.**

The most typically used in the United States is *Robert's Rules of Order*, which involves a structured set of rules and is based on decisions by majority vote. (You can purchase a book of these "rules" at any bookstore.) Many nonprofit organizations specify in their bylaws that meetings will be run using *Robert's Rules of Order*. Other approaches - such as operating on a consensus basis - can be equally appropriate; just be sure everyone knows the process to be used.

7. **Determine necessary attendance based on the agenda.** It is important in planning a meeting to decide who should be present, and then give them as much advance notice as possible to help assure their attendance.
8. **Start and end meetings on time.** Most people attending a meeting have other commitments, and should be able to count on the meeting's starting within a few minutes of its scheduled beginning time, and ending within a few minutes of its scheduled adjournment. Sometimes, a longer-than-usual meeting may be required; this should be predicted, and participants should be told how much additional meeting time will be required.
9. **Keep meetings "on track."** Encourage discussion, but keep it focused on agenda topics. To keep track of comments that are important but don't relate to the current agenda item, keep a piece of flip chart paper on the wall and write them down. Then be sure they are addressed at the appropriate point in the meeting – as part of some other agenda item or under "Old Business" or "New Business." Some groups go around the table at the end of a meeting so that any topics not covered can be addressed briefly.
10. **Schedule the most critical items early in the agenda.** This assures adequate time for discussion and full participation attention, since participants are likely to be most alert and involved early in the meeting and no one will have left. Identify one individual to be responsible for taking minutes. Sometimes staff takes responsibility for minutes, but this can be very time-consuming for an organization with a small staff. The time requirements for staff or volunteers can be minimized if minutes briefly summarize discussion and focus on reporting actions taken.
11. **Ask participants for advice and assistance in improving meetings.** If you expect to have regular meetings, try going around the table and asking participants to comment on the positive and negative aspects of the meeting, and to offer suggestions for improving future meetings.

***If you chair the meeting...***

- **Be more concerned with the process than the content.** Keep the meeting moving to its conclusion and stay out of the discussion. If you have a strong interest, delegate the chair during that issue.
- **Protect the weak and control the strong.** Make sure everyone has an opportunity to speak, and no one interrupts.
- **Don't watch the speaker,** watch the listeners' reactions.
- **Ensure a result** – identify the issues, and agree on a decision or action to be taken.
- **Agree on deadlines for updates or further action.** Set a date, time and place for the next meeting before leaving this one.
- **Send good action-needed notes promptly to each participant.** Provide formal minutes if the organization has legal status or the process requires official documentation.

*(Source: Modified from Emily Gantz McKay, A Guide to Effective Meetings. Washington, D.C: National Council of La Raza, 1993; contains ideas from Arthur Young, The Manager's Handbook, United Kingdom, Special American Edition. New York: Crown Publishers, 1986.)*

For more information about effective meeting management and tips visit:

- <http://www.mindtools.com/CommSkill/RunningMeetings.htm>
- <http://www.wikihow.com/Run-an-Effective-Meeting>
- <http://office.microsoft.com/en-us/outlook-help/manage-meetings-effectively-HA001149246.aspx>
- <http://urbanext.illinois.edu/lcr/meeting.cfm>
- <http://www.better-leadership.com/effective-meeting-management.html>