Seven tips to help you facilitate an effective meeting

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You're fretting about that upcoming meeting you're facilitating. You're scared you'll lose control, that you'll go overtime, or that no decisions will be made. Bad meetings are unfortunately very common in the nonprofit and charity sector. This is despite the fact that many nonprofits and charities strive to be accountable, collaborative, and inclusive, which are hallmarks of a good meeting culture. But your meetings don't have to be bad. Here are seven tips that can help you lead an effective meeting.

1. **Know your role and own it.**

A facilitator's job is to help the group reach the best outcome possible. You get to decide when and for how long the group will talk about each agenda topic, as well as who talks. You also decide how the group will discuss each topic. Do you want to have a debate? Do you want the group to talk in small groups or one large group? Do you think it's time to vote?

Own that power. If you let the group discuss and decide how to proceed on process, then you could lose control of the meeting. People generally don't want to make decisions about how to make decisions. They want you to lead that process so they can get on with the important stuff - making the decision.

That said, you can still ask for advice on how to proceed. For instance, you can say something like "are we ready to do a vote on this?" If you need extra help then call a five minute break and ask one skilled person to help you decide on next steps. Good facilitators constantly read the group to ensure the team feels good with their process-decisions. But ultimately, the decision on how to proceed is yours.

Despite all this talk of power, you're not a dictator. A facilitator does not make decisions for the group, and usually facilitators don't even share their own opinion. In other words, the facilitator does not respond directly to a meeting participant with a comment like "I disagree with your proposal to host a workshop next week." If you have a vested interest in the outcome, it's probably best not to take on the role of facilitator.

2. **The agenda is key.**

A lack of preparation into agenda setting is a key reason why meetings go sour.

Set the agenda in advance. Ask members for agenda items at least a week before the so they have time to think of some topics and develop a thoughtful proposal to present to people prior to the meeting.

Collate the agenda items, add your own, and send your proposed agenda to members prior to the meeting so they can give feedback.

Prepare people to speak to their topic. Ask them to do their research, prepare their presentation, bring handouts and be ready to answer questions. It is surprisingly common to have folks suggest agenda items yet not be prepared to speak to the matter. Don't waste people's time.

Don't overload the agenda. Topics usually take longer than allocated, and people love a facilitator who concludes the meeting early.

Put the most important agenda items near the start of the meeting. This ensures the topic is discussed and you debate the matter while energy is still high.

3. **Logistics matter.**

Eliminating logistical problems requires attention to detail. Don't be the facilitator who has everyone waiting half an hour because someone has to buy that Mac connector cord that your presenter forgot to bring.

Make sure the room is appropriate and as comfortable as possible. If using an off-site meeting room, it should be located near public transit and/or parking that is easy to find. It's distracting when people frequently leave to fill their meter. Meetings should take place in a quiet room, meaning cafes and restaurants are not good choices. Do the chairs move or are they nailed to the floor in classroom format? Is there air conditioning? I once organized an 80-person event in a government building and found out just before the event through a casual conversation with a receptionist that the building's air conditioning was off on weekends and it cost $2,000 to have it turned on for that day. Don't repeat my mistake.

If you are showing a PowerPoint presentation, have it saved in three formats (PC, Mac, and PDF). Collect, order and/or confirm all AV equipment, laptops, and connector cords. Bring a USB stick and an extension cord. Check that markers work and that you have flip chart paper and/or whiteboards are available in the room.

Arrive 30 minutes early to set up.

4. **Respect the rules.**

Know and abide by the group's formal decision-making structure. Some common decision-making structures include:

- **Consensus.** Everyone agrees, or everyone agrees not to oppose a decision.
- **80% voting majority.** The decision is approved if 80% of people vote for it.
- **51% majority.** The decision is approved if 51% of people vote for it.
- **One or two people hold the power.** This is fairly typical in hierarchical decision-making environments, such as many large nonprofit organizations.

Make sure everyone else in the group understands the decision-making process as well. Don't pretend that everyone has the authority to make a decision.

You can also identify the individuals who have special authority or influence over specific agenda topics. For instance, if you're talking about implementing a communications plan for a fundraising event, both the fundraising director and communications director should be comfortable with the proposal.

At the start of the meeting it's useful to be clear about expectations: "We're making decisions using consensus today" or "This is an advisory meeting; Bob and Farah over here will be listening to your feedback and finalizing their decision in the next few days."

5. **Respect the culture and the code**.

There's more to decision making than just knowing a group's official decision-making process. Each group has their own unique way of dealing with meetings. Observe the meeting culture and match it.

Here's some examples of how meeting culture can vary.

Some groups LOVE creative exercises, such as theatre of the oppressed tools and fun introductions. This could be answering questions like "what's something that no else in this room knows about you?" At more formal meetings, this often does not work. Some professionals won't want to talk about their personal lives or do anything more innovative than small group work.

Some groups like to make decisions in advance. For instance, many community and labour groups have staff interview representatives from key groups and craft proposals based upon these interviews. The proposal is usually

developed, adapted, and informally agreed upon prior to the meeting. Approval of the decision at the meeting is often just a formality. Controversial decisions that wouldn't get approval have already been discarded. Other groups might see this process as undemocratic.

Some groups have a culture of loose facilitation, where the facilitator rarely intervenes and allows for members to stray a little. Other groups have a culture of tight facilitation, where the facilitator might keep rigid track of who is speaking and how long they can speak for. For instance, Robert's Rules of Order is a very formal decision-making code that is often used by legislative bodies and some groups that abide by a 51% majority decision making system. Robert's Rules of Order would be inappropriate in an activist group that makes all decisions using consensus.

The variations on meeting culture are endless. The best way to find out a group's culture is to ask questions and observe their other meetings. Then abide by the code.

6. **A three-part process to getting through any agenda item**.

For each agenda time follow this simple, three-step process: get the information out, track solutions, then make decisions. Let's explore these three points.

First, ensure everyone has the information they need to make a good decision. You could encourage the sharing of information by having a participant offer a one-page proposal or deliver a PowerPoint. It's also useful to allow other participants to share any additional information they know about the topic. Finally, allow participants to ask clarifying questions. If there are some gaping holes or unanswered questions then consider postponing the item so the needed information can be collected.

Second, allow for debate and discussion. The most common way to do this is for everyone to stay in one group and discuss and critique possible solutions. This stage is messy. Sometimes people will suggest new ideas, while others will critique current proposals.

During this discussion you should be doing a few key things:

- **Track for solutions.** That means you should be writing down any solutions that people are proposing.
- **Gauge where people are at on the solutions that are being identified.** For instance, if a proposal is suggested do people nod in agreement or cross their arms and look stony-faced? Do people keep talking about one proposal in a positive way?
- **Make sure people stay on topic.** It's your job to keep everyone on track. Let one person go off topic and soon others will stray. If someone goes off topic I let them finish and then say "let's deal with that later. Right now let's focus on this topic."
Third, when you sense the group is ready to start moving toward an actual decision.

How do you know when the group is ready to decide? Some signs include:

- more than a few people are talking about implementing an idea.
- there's lots of nodding when someone talks about a proposal.
- a clear proposal or series of proposals have surfaced.
- people are repeating themselves.
Once you're reached this point, state the proposals out loud and, ideally, write them down so people know what the options are. If necessary, you can amalgamate common proposals.

Then vote. If there are multiple proposals, it can help to ask everyone to vote once for their favorite proposal. If there's a clear winner then you're home free.

If you don't have the votes to approve a proposal then it can help to ask the people who are opposing the most popular proposal to suggest ways this proposal could be improved so that they would support it. You could either

make alterations at this point or send it to a designated team to come up with a better proposal to present at a future meeting. Delaying a decision is aways better than implementing a bad decision.

It's wise to gauge whether the proposal has the support needed for successful implementation. Important decisions - such as deciding the group's priority political campaign - should get the group's near unanimous support, even if 51% is all that's needed for formal approval.

7. **Deal with the difficult people**.

Difficult people might speak out of turn, get unnecessarily angry, talk too much, take over the meeting, or sabotage decisions. As the facilitator, it is your job to deal with them and keep the rest of the group on track.

Here are some tips:

Know in advance if there are people attending who can be resistant to new ideas or the decision-making process. This gives you time to mentally prepare.

Use the power of the group. You could ask a few of the more influential participants to back you up if you need to ask the disrupter to change their behavior. For instance, I once was in a situation where one participant kept trying to take over the agenda and change the topic. Instead of trying to engage in a power struggle over the agenda I asked the group if they wanted to stay on the current topic or move to the topic this person was suggesting. The group said they wanted to stay on the current topic.

Refer to the ground rules. For instance, if someone is constantly interrupting others, it is helpful to go back to the ground rules that were presented at the beginning of the meeting. Two of those ground rules could be 1) no interrupting others and 2) make sure everyone has a chance to voice their opinion. If they break the rules then you can remind them that the group agreed that these were the rules of the meeting.

You - or someone in the group - could even have a one-on-one conversation with the problem person so that you are aware of their concerns and they know that disruptive behavior is detrimental to the productivity of the meeting. Sometimes people simply don't understand how effective meetings work.

Sometimes difficult people have genuine concerns and the group's failure to act on their ideas has prompted this person to be difficult because they feel ignored. These larger issues should be addressed by the group.

This article originally appeared at www.jessicabell.org and is reprinted with permission.

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