



Positive and Productive Meetings

 **LEADING**
PERSON-CENTERED **CHANGE**



**Learn more about
the Teams and
Leaders Programs
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This course is part of the Leading Person-Centered Change Series for developing person-centered leaders, individual contributors, teams, and organizations. Leading Person-Centered Change is a Teams and Leaders offering from Helen Sanderson Associates. These materials may be used only as part of the associated training program by the registered participant. This leadership development program is available in your community due to HCBS funding from the California Department of Developmental Services. For more information about Teams and Leaders offerings, visit helensandersonassociates.com



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Why Positive and Productive Meetings?

Every team has different struggles in the meeting room, but certain themes consistently emerge:

- People don't feel listened to
- Agendas are too full, if they are used at all
- Certain people dominate discussions
- Meetings are boring and lack purpose
- Meetings end and no one knows what to do

Considering the amount of time you spend in meetings, and new challenges introduced with hybrid meetings, it's no wonder you are seeking new strategies to make the most of your valuable time.

Not all meetings are bad. If you are fortunate to have a thriving meeting culture, the principles and practices you will discover today can augment and support your current meetings and raise the bar on excellence.

Positive and Productive Meetings gives us a chance to think about ways that you can make your team meetings better. We hope you will reflect upon how you can use the strategies you practice today to improve upon existing meeting habits.

How we will spend our time

- Our purpose today is to learn about and practice using some tools and techniques for Positive and Productive Meetings.
- We will discuss some common meeting challenges and how the five elements of the Positive and Productive Meetings process can address those challenges.
- We want you to learn and practice something today that you can implement tomorrow!





How Much Time Do You Spend in Meetings?



Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Totals
							+
							+
							+
							+
							=
						Monthly total	

How much of this time was positive and productive?

☐ 0% ☐ 25% ☐ 50% ☐ 75% ☐ 100%

How much time did you spend preparing for all these meetings?

Guiding Principles of Positive and Productive Meetings

Positive and Productive Meetings is based on three simple, yet crucial guiding principles. Teams that want to work together positively and productively must:

- 🌀 Have a clear purpose and clear outcomes for each meeting.
- 🌀 Create a process and environment where people can be listened to and think for themselves.
- 🌀 Work to people's strengths and share responsibility for different roles in the meeting.

Positive and Productive Meetings uses questions to focus teams on their meeting process. The questions are linked to menus of tools and strategies that guide meeting teams to define and clarify their **purpose**, to support and value **people**, to clarify **performance** standards, to develop and implement a workable meeting **process**, and to assess and identify ways for the team to **progress** toward achieving goals and focus on continuous improvement.





Working/ Not Working

Take a few minutes to jot down what's working and what's not working about the various meetings you regularly attend.

What is WORKING about the meetings I attend	What is NOT WORKING about the meetings I attend

Elements of Positive and Productive Meetings



Purpose

Why are we here?

Why am I part of this team?



People

Who are we?

How do we support one another?



Performance

What does success look like?

How can we tell how well we are doing?



Process

How can we work together?

How will we deliver success?





Progress

Progress How are we doing?

How can we improve?

Elements of Positive and Productive Meetings

					WHAT IS THE IMPACT WHEN THIS ELEMENT IS MISSING?
PURPOSE (Why this meeting group exists)	PEOPLE (Roles and Rules)	PERFORMANCE (Outcome-Focused Agenda)	PROCESS (meeting Map, Methods of Engagement)	PROGRESS (Decision-making, Documentation, Doing better)	WHEN NONE ARE MISSING = POSITIVE AND PRODUCTIVE MEETINGS
	PEOPLE (Roles and Rules)	PERFORMANCE (Outcome-Focused Agenda)	PROCESS (meeting Map, Methods of Engagement)	PROGRESS (Decision-making, Documentation, Doing better)	MISSING PURPOSE = CONFUSION
PURPOSE (Clear purpose statement for group and for meeting)		PERFORMANCE (Outcome-Focused Agenda)	PROCESS (meeting Map, Methods of Engagement)	PROGRESS (Decision-making, Documentation, Doing better)	MISSING PEOPLE (ROLES AND RULES) = CHAOS
PURPOSE (Clear purpose statement for group and for meeting)	PEOPLE (Roles and Rules)		PROCESS (meeting Map, Methods of Engagement)	PROGRESS (Decision-making, Documentation, Doing better)	MISSING PERFORMANCE (CLEAR OUTCOMES) = LACK OF CLARITY
PURPOSE (Clear purpose statement for group and for meeting)	PEOPLE (Roles and Rules)	PERFORMANCE (Outcome-Focused Agenda)		PROGRESS (Decision-making, Documentation, Doing better)	MISSING PROCESS (WAYS OF WORKING) = LACK OF ENGAGEMENT
PURPOSE (Clear purpose statement for group and for meeting)	PEOPLE (Roles and Rules)	PERFORMANCE (Outcome-Focused Agenda)	PROCESS (meeting Map, Methods of Engagement)		MISSING PROGRESS (NO ACCOUNTABILITY) = CYNICISM






Purpose Statement

Purpose









Roles

Role	Accountabilities	Success means
 Facilitator	<ul style="list-style-type: none"> • Enabling the team to work through the agenda • Confirming agreements around actions • Making sure the discussion is related to the agenda questions, and if it is not, suggesting the topic be moved to the parking lot/burning issues list • Summarizing the issues aired in a round and ensuring that people know and understand the outcomes and agreements before they are recorded. 	<p>We move through the agenda efficiently and effectively.</p>
 Agenda Developer	<ul style="list-style-type: none"> • Contacting team members before the meeting and requesting agenda items for discussion (phrased as questions) or for information. • Asking people to suggest how much time should be allocated for the item. • Preparing copies of the agenda for everyone. • Coordinating with chairperson or facilitator to clarify and confirm timings. • Transferring items from the burning issues list to the next agenda. 	<p>We have a way to contribute to the agenda. We receive our agenda before the meeting. The agenda is presented as questions with outcomes, and organized into items for discussion and items for information.</p>
 Recorder	<ul style="list-style-type: none"> • Documenting actions and agreements that emerge from discussion items • Including details of who, will do what, by when. 	<p>We have actions recorded from our meeting and receive these within two weeks after the meeting.</p>



Roles

 Timekeeper	<ul style="list-style-type: none"> • Reminding the facilitator/chair just before the time for an item is up. • Ensuring that the meeting begins and ends on time. 	
 Hospitality	<ul style="list-style-type: none"> • Creating an environment that says, “you matter”. 	<p>We meet in a pleasant, welcoming environment with color, music, food, and drinks.</p>
 Meeting Process Coach	<ul style="list-style-type: none"> • Ensuring that the meeting process is followed • Ensuring that the meeting agreements are reviewed at the beginning of every meeting and that they are adhered to. 	<p>We are reminded of our meeting agreements at the beginning of the meeting and are supported to keep to them.</p>
 Round Leader	<ul style="list-style-type: none"> • Introducing a round question at the opening and closing of each meeting. 	<p>We begin and end our meetings with rounds. We use rounds for agenda item discussions as requested.</p>
 Meeting Evaluator	<ul style="list-style-type: none"> • Ensuring the team evaluates the meeting process at a certain interval (quarterly, semi-annually) 	<p>We review our meetings quarterly.</p>
 Participant	<ul style="list-style-type: none"> • Reading the previous meeting minutes • Contributing to the agenda where appropriate • Considering their ideas and input about each agenda item • Reading and meeting materials that are sent in advance • Committing to spending the whole meeting time present ‘Finding someone to take your place if you can’t attend 	<p>We take individual responsibility for how each of us contributes to the successes, failures, and continuous improvement of our meeting processes.</p>



Roles for the Meeting

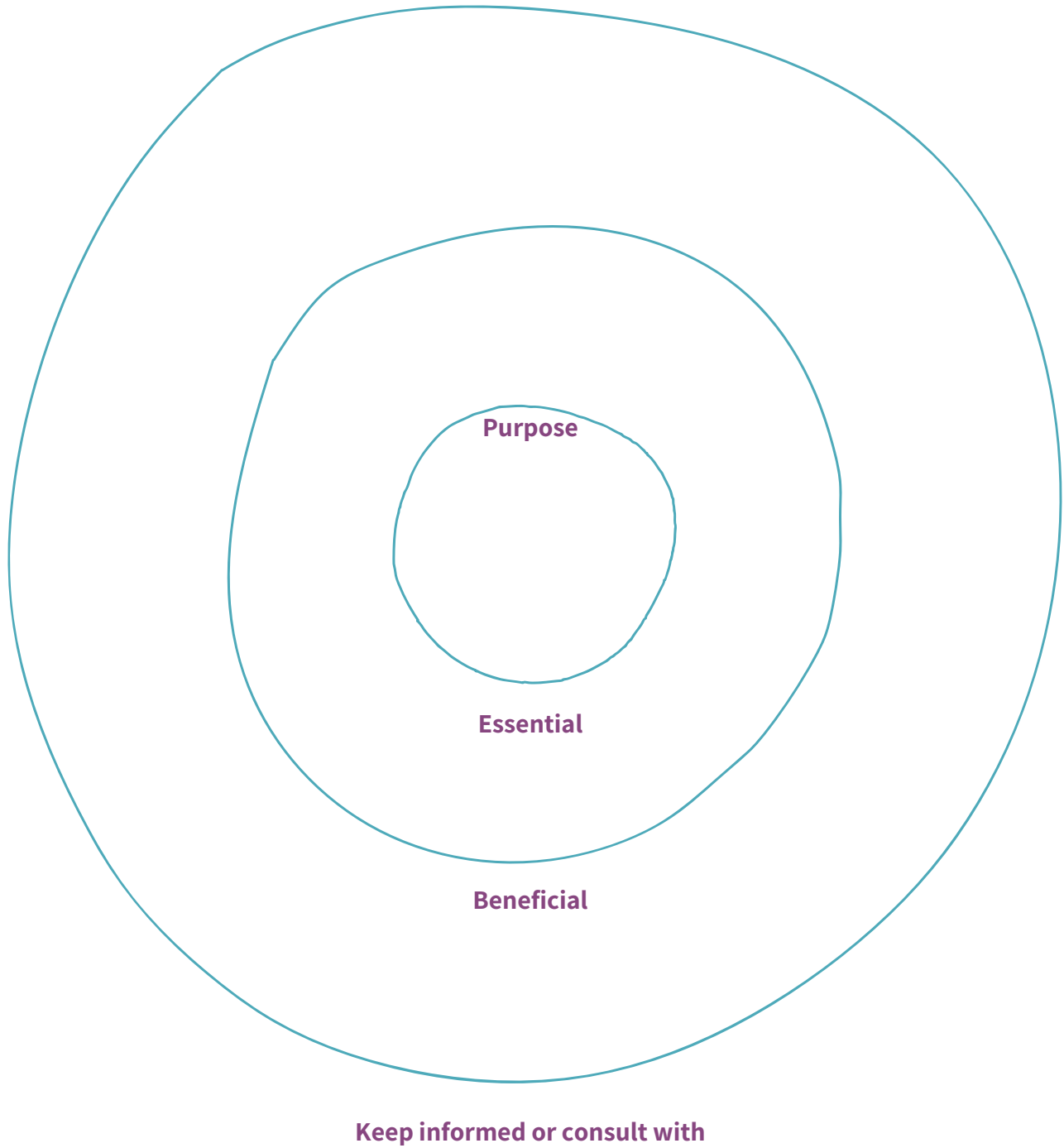
Practice what you have learned by choosing people within your group to fill these roles during your practice meeting. Define what success looks like for each role.

Role	Who	Success Looks Like
 Facilitator/ chair		
 Agenda Developer		
 Recorder		
 Timekeeper		
 Hospitality		
 Meeting Process Coach		
 Round Leader		
 Meeting Evaluator		



Relationship Circle

Who to involve and what is their role?





Meeting Map

Meeting Agenda:		Date:	Time:
Pre-Meeting & Standing Items		Purpose:	
1. Agenda Development			
2. Hospitality/Set Up			
3. Opening Round		Meeting Agreements	
4. Review Of Meeting Map			
A. Assign Roles			
Agenda Developer:		Facilitator:	
Hospitality:		Recorder:	
Process Observer:		Timekeeper:	
B. Review Rules			
5. Clarify/Revise Agenda & Timing			



Practice Agenda

Use this blank agenda to practice your agenda

Question	Owner	Decision/ information	Desired Outcome	Come Prepared By	Allotted Time



How To Record Actions and Agreements





Agenda Item	Agreements/Decisions	Action		
		What	Who	By When



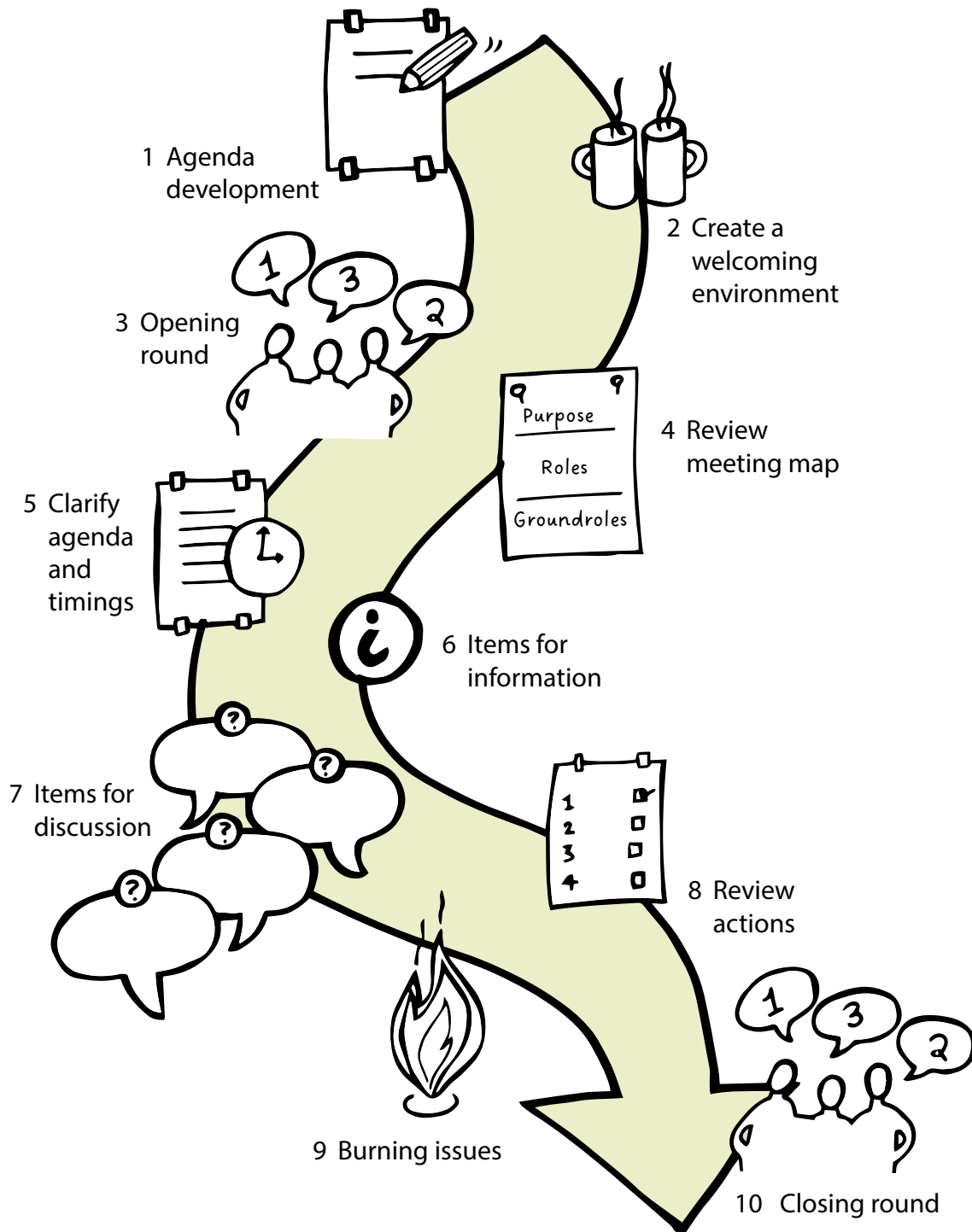
Checking the Agenda

- ☐ Is there a statement of the purpose of the meeting overall?
- ☐ Is there a specific purpose for this particular meeting?
(This could be the outcomes that you want to achieve).
- ☐ Is it clear how people need to prepare?
- ☐ Does it tell you when and where the meeting will be held?
- ☐ Is the agenda accessible and easy to read for everyone?

Suggestions

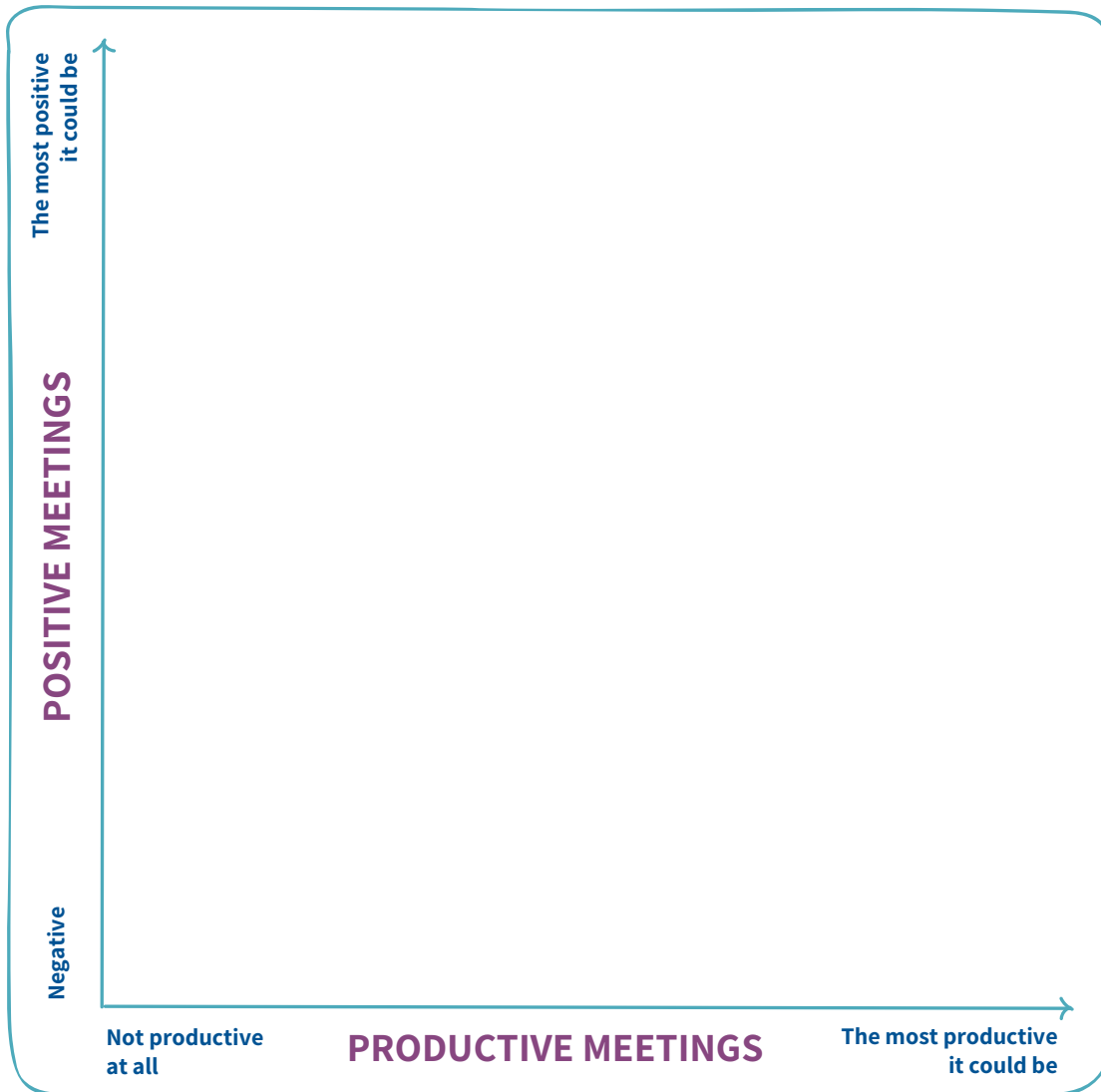
-  Can you make it engaging and interesting – make people want to read it and want to attend?
-  Do you need it to be accessible or available in different formats or languages?
-  Will you be sending out hard-copies, electronic meeting invites, or different ways for different people?
-  Are you sending it in good time for people to prepare?

Summary of Positive and Productive Meetings Process





Evaluating Your Meeting: Vote With a Dot



Comments



What Worked and Didn't Work About the Meeting

You can record generally what worked and did not work about a meeting. Look at a specific area, for example, what is working and not working about the use the meeting agreements.

What Worked	What Didn't Work



What have we tried?

What have we learned?

What are we pleased about?

What are we concerned about?

What do we need to do next?



Meeting Agreements



A large, empty rectangular box with a light blue border, intended for writing meeting agreements.



We don't follow the agreements in meetings

We completely follow the agreements in meetings



Confirmation Practices for Meetings

Ref	Statement	1-5	Why?	Act ons	Who
Q1	We are working on the right things				
Q2	We are working on the right number of things				
Q3	We are working on things in the right way				
Q4	My needs are being met				
Q5	We are making the most of my strengths				



Reflection

Things I want to remember...

Things I want to try...

