# 1

# Planning a Meeting

A teacher friend of mine told me about a recent staff meeting she had attended. The faculty gathered in the school media center at the conclusion of a long and difficult workday. They grabbed bottles of water or a cup of coffee and sat down in hard plastic chairs around scattered tables. They exchanged pleasantries briefly, then faced the front as the principal spent three quarters of an hour giving updates, announcing decisions, and outlining his thinking about various issues facing the school and district. He paused for a restroom break, then provided a summary of the school's recent test results. My friend noticed several colleagues grading papers. Another, she said, was jerked awake by a peer. The teacher next to her completed a grocery-shopping list.

This meeting, while familiar to many, thankfully is no longer typical. More and more, group work is becoming a part of educators' work. We are leaving behind the isolationism that closed teachers off behind their individual classroom doors and forming groups with colleagues to collaboratively solve problems and focus collective time on student learning goals. As we do so, we must develop new skills to work together more efficiently and effectively. We need to spend more time working together, yet we feel pressed for time from all fronts.

Almost 70% of workers in organizations feel that meetings are unproductive, according to the 2005 Microsoft Office Personal Productivity Challenge, an online survey of more than 38,000 people worldwide. Respondents also said that ineffective meetings were one of the top impediments to productivity.

Contrast the meeting on the previous page with another I recently witnessed. In this one, also a meeting for teachers, the grade-level group met early in the day in the school library. The group gathered, facing each other around a large table. Substitute teachers covered the teachers' classes for the first half hour of the school day. As they arrived, teachers helped themselves to fruit and bagels and then quickly got down to work. A facilitator/recorder with chart paper was ready at the side. One member passed out samples of student work. The others knew from the group protocol how the meeting would proceed. After discussing the work for about 45 minutes and collaborating to improve the assignment, the teachers spent a few moments moving around in an energizing activity the facilitator had planned. They regrouped, summarized, and laid plans for their next meeting with a totally different focus and a more formal agenda.

Meetings can be productive when we follow some simple guidelines.

## DECIDE WHETHER TO MEET

We *can* use meeting time to efficiently conduct work that advances learning goals. As a first step, we need to pause before scheduling another meeting to evaluate the benefits and weigh the real costs. Deciding whether a meeting is really necessary is the first step in beginning to "work smarter."

> **Tip:** To begin to break the meeting habit, try hosting a 10-minute meeting or schedule a stand-up meeting. If standing becomes uncomfortable, the meeting is too long!

We first must ask whether there is a real reason to meet. Meetings too often are used simply to present information. In deciding whether to meet, ask, "Is there a different way to accomplish the same purpose?"

Using time wisely means forming groups only when the work warrants the involvement of those participating, when their knowledge and skills are needed to achieve the task. Before meeting, try asking, "What decisions need to be made by those who would be asked to spend time in this group?"

Ask, "Does the group have a clear purpose?"

If a meeting is not necessary, then try these strategies to accomplish the goal.

### Share Information

- *"FYI" Copies of Minutes/Letters/Reports.* Rather than calling everyone to a meeting, include only key people and allow others to read the results. This is a useful strategy when a smaller group, such as a home-school relations committee, could accomplish the work and provide the results to the larger staff.

• *E-mail Messages.* E-mail is good one-way communication when a message needs to be sent immediately for receivers to be informed quickly. The tone of e-mails can be misconstrued, so pay attention to language and word choices. E-mail is a good tool for making announcements. Using e-mail depends on the culture of the targeted audience. You must be confident the group regularly uses this form of communication.

• *Voice Mail Messages.* Voice mail messages get the word out but can feel distant to the receiver. Use voice mail only when specific information needs to reach a number of people quickly or when the information is not important enough to warrant a conversation. This is a good means for conveying information but doesn't invite dialogue or build communication. A time to use voice mail might be when providing an update. Although voice mail has some associated negatives, it may still be more efficient than a full meeting.

• *Bulletin Board Messages in High-Traffic Areas.* Another form of one-way communication, posting flyers on bulletin boards, can convey key information in a time-efficient way. Posting information this way, however, does not ensure that the appropriate people have read it. The time to use such a posting is when information is less critical but still necessary, such as notice of an event.

• *Informal Newsletters.* Newsletters don't have to be designed or formatted. As a means to convey information, they may be nothing more than bulleted items in a list. This is another means of one-way communication when there is no need for dialogue or feedback and no action is expected from the recipients.

• *Weekly Bulletins.* Routine updates, such as often occur at staff meetings, can be easily dispensed in a written communication such as a weekly bulletin. Making this an ongoing communication alerts recipients that the information will be relevant and useful. This is a good venue for information about working conditions, rather than about the actual work of teaching and learning.

• *Intranets.* Many of the suggestions above, such as bulletins, newsletters, and messages, can be implemented online when schools are in the habit of using an internal Web site for communication or record keeping.

## Collect Input or Stimulate Thinking

• *A Round-Robin Memo.* Send a memo with the information to a list of individuals. As each individual reads the memo, he or she can add notes to the bottom of the page. That person then checks off his or her name on the list of recipients and sends it along to the next person. Round-robin memos are useful for information that is necessary but not time-sensitive, such as letting others know about a proposed policy change and inviting feedback. Using a cover memo also helps ensure that targeted individuals have received the information.

- *Electronic Communications/Electronic Bulletin Boards.* This strategy is useful when dialogue is helpful and there is no pressing deadline for action. Bulletin boards might be used, for example, to receive feedback on an actual or proposed rule change.

### Begin a Dialogue

- *Telephone Calls.* When the message needs to be personalized and a dialogue might ensue, the telephone is still a good choice. Although potentially more time consuming for the caller, it can ultimately save valuable resources by limiting others' time on the task. This is a good tool when there are a limited number of people involved, such as when a principal must make an immediate decision with input from key staff.

- *Informal Conversations ("Hall Talk").* The informal nature of conversation often helps build relationships while conveying information. If the information is not time-sensitive, hall talk can be a good alternative to a formal meeting. The downside of this informal form of communication is that it may not be systematic and so the information may not reach everyone, nor will people hear the information in any particular order. This can result in rumors. And for the people who were not included in the informal conversations, it can be seen as an exclusive process. Sensitive people will take it personally and may begin gossiping about who was included and who was excluded.

- *One-on-One Conversations.* If only a few key people actually are involved in the work and a decision must be made quickly or the issue is pressing, having individual conversations can be helpful to avoid a delay while trying to coordinate everyone's schedule. It is good for gathering input when one person is the decision maker. This tactic does not allow for group dialogue or brainstorming that might be helpful in problem solving.

After considering some of these options, you may find that you don't even need to schedule a meeting. If you have the authority and have decided a meeting or meetings are necessary, the following steps can help ensure that you achieve your desired outcome.

## PLAN WITH A FEW COLLEAGUES

Sometimes, the work may benefit from the joint efforts and talents of your colleagues. With careful planning, you can achieve the goal and involve others. Begin by gathering a group of people who will help clarify and organize the tasks to be done.

This planning group should include just a few people who will help clarify the issues and identify needs. The planning group later may be merged with or supplanted by a larger working group that will carry out the group's purpose.

In an initial session, the planning group considers these guiding questions:

**Tip:** Maximize efficiency by limiting the group size and involving only key stakeholders. Involve those who might feel excluded, delegate some of the work, and invite stakeholders' input in the process.

- What is the challenge or task we believe needs to be addressed?
- Is the need documented? What data support the issue?
- What is the desired outcome?
- Do the desired outcomes require the kinds of discussion and decision making that are best accomplished in a group?
- Are there other ways to achieve the desired outcome more efficiently?
- Who would participate in the group? Who would expect to or want to be present and represented?
- Who might feel entitled to participate?
- Will those affected by the project's outcome be willing to share ideas and information, and will they support the team's plans to meet the desired outcome?
- Who can best contribute to the desired outcome?
- When, where, and how often will the group meet?
- Is there enough time allocated to achieve the desired outcome?
- What are the costs (in staff time and resources) and the benefits of convening a group around this outcome?

You may want to select the appropriate questions for your team and post them on chart paper. Address the questions one by one, or have a more general dialogue and use the guiding questions to prompt discussion at key points. Be sure to cover the essential issues and decide whether forming a working group is the optimal way to address the identified need.

This initial discussion may last as little as 15 minutes or up to an hour, depending on the length and complexity of the issues. At the end of this session, be sure to thank members of this group for helping to clarify the task and ensure that the next steps are productive.

## Determine the Group's Purpose

For every meeting, it is imperative to come up with a compelling statement that describes the purpose or at least one intended outcome. If nothing worthwhile seems to surface, the same will happen during the session.

Groups with a clear purpose are more likely to sustain member involvement and dedication to the task over time. Developing a purpose statement for the group's work is an essential component of creating commitment. If members do not feel an emotional, moral, or ethical response to the group's purpose, they are less likely to be deeply involved enough in the work to help produce a quality result. As Michael Fullan (2001) states, "Focusing on outcomes clarifies for teachers and principals what they are trying to accomplish and drives backward through the process toward moral purpose" (pp. 117–118). A strong commitment between and among group members to produce high-quality results is key to getting the job done well. That cohesiveness comes about through having a clear purpose.

Katzenback and Smith (1986) state that the best teams invest time and effort into exploring and shaping a specific purpose that everyone in the group can agree with and translate into the group's performance goal. Sometimes, determining the group's purpose is a simple process; there is a clear outcome, a clear need. At other times, the process of developing a purpose is more complex and involves more group discussion of the issue.

If the group needs more discussion, consider these questions:

- What work is the group expected to do?
- What key decisions have to be made to accomplish that work?
- Is there an expected product?
- Who is the recipient of the product?
- How will the product be used?
- Who will be affected by the outcome of the work?
- What is the relationship and alignment of the purpose to the organization's goals?
- Where does the group fit in the hierarchy of the organization?
- Are there any preconceived opinions of the group's task by group members or others?
- Who has veto power over the group's recommendations or decisions?
- How much time will the group need to complete the task?
- What are the implications if the group does not accomplish its task?
- What resources are available to help the group accomplish its goal?
- When will the group disband? Is it a standing committee or a task force?

The answers to these questions not only help clarify the group's purpose but also contain essential information to provide to potential members when inviting them to be part of the work.

## Consider the Nonpurpose

While teams are defining a purpose, some also find it useful to define the *nonpurpose.* A nonpurpose states what is off-limits. Knowing what the group is *not* going to address can greatly increase the group's effectiveness. Groups often state a purpose but rarely clarify the nonpurpose.

A nonpurpose clearly identifies issues that the group might be tempted to discuss but that will not further the process or help the group achieve its goals. For example, if the group's purpose is to "Create a new schedule for the middle/high school within the budget constraints," the nonpurpose might be, "We will not discuss the contractual issues that need to be resolved before implementing the new schedule." Or when a group is meeting to "Discuss the role of literacy coaches and their work in classrooms," members may state their nonpurpose as, "We will not discuss the effect of the principal's resignation on the work of the coaches." While leadership changes may be related to the role of the coach, the team has no authority to select the new principal. Stating the nonpurpose keeps the group from spending time on an issue it cannot control.

If nonpurposes don't arise naturally, don't force them. You can add to them during sessions when they pop up in discussion. Don't be surprised if you have more nonpurposes than purposes during a particular session. Remember, "non" is not negative. Putting some issues outside the group's concern ensures that its focus is clear. The greater the clarity, the greater the results. Nonpurpose statements keep groups from spinning their wheels or getting off track.

As group members are defining the purpose and nonpurpose, continue to ask them to comment, ask questions, identify concerns, and reach group understandings.

## Decide Who Writes the Purpose Statement

Discuss with planning-group members whether the planning group or working group needs to write the purpose statement.

Having the planning group define the purpose and present it later to the working group as a finished product gives the working group a clear starting point and allows it to immediately focus on the work. Having a purpose statement in hand also means one less meeting for the larger working group, a more efficient use of more people's time. However, without being involved in writing the purpose, some group members may not feel the level of commitment to the product they would have had they been involved in creating the purpose statement.

> **Tip:** If the planning group writes the purpose statement, be sure to revisit the purpose with the working group at the first meeting.

## Write a Formal Purpose Statement

If the goal or need is not particularly complex, the purpose statement may have become clear as the planning group answered the guiding questions for deciding whether it was necessary to meet. For more complex issues, the group may need more discussion for members to clearly state the group's purpose.

When the group is ready to prepare a formal purpose statement or mission, provide several samples before beginning to take ideas. (See Handout 1.1: Sample Purpose Statements.)

Purpose statements should be short, clear, and specific. The following are some examples:

- The sixth-grade team will develop 10 common assessments for mathematics. They will use the data from the assessments to guide instructional planning.
- This group will examine the K–12 writing program, evaluate resources, and make recommendations to the English language arts director and assistant superintendent for curriculum and instruction for improvements to the K–12 writing program.
- The committee will analyze student data and staff needs and develop the professional development priorities for the school year.

**Tip:** As the group prepares its purpose statement, be sure members understand whether the group is advisory or has authority as a decision-making body.

### Continue the Discussion

- *Ask for Questions.* Once the group has written its purpose statement, ask participants to contribute any remaining questions by writing them on index cards. Take time to respond to questions, and research any unanswered questions to present at a future meeting.

- *Continually Assess Commitment.* When a group meets over a long period of time, members may find it necessary to revisit the purpose and the outcomes the group desires to ensure that members maintain their clarity and commitment still exists. Assessing the group's commitment to the purpose can be a useful periodic checkup. A quick check of group members' reactions to a few simple questions using the Likert scale can help keep the group on track. (See Handout 1.2: Analyzing Group Commitment.)

- *Keep the Purpose Out Front.* Revisit the group's purpose statement at the beginning of each successive meeting. Write the group's purpose statement at the top of the agenda or on chart paper to post at each meeting. Some groups also have their members sign the chart as a team-building exercise. The symbolism of adding signatures to the purpose statement is sometimes helpful to building group commitment.

## SELECT GROUP MEMBERS

Having the right people represented in the group is crucial to its success. Katzenbach and Smith (1986) define a *team* as a small number of people with complementary skills who are committed to a common purpose, performance goals, and common approach for which they hold themselves mutually accountable.

## HANDOUT 1.1: SAMPLE PURPOSE STATEMENTS

This group will assess the current quality of K–12 student writing in the _________ school district and make recommendations to _________ for program improvements.

This group will generate a list of methods of assessing student learning outcomes and provide models/samples of each form of assessment.

The sixth-grade team will develop 10 common assessments for mathematics and use the data from the assessments during grade-level team meetings.

This group will study current available data for meeting the needs of gifted and talented students in regular classrooms. The group will examine research-based strategies and develop a plan to meet the needs of students in Grades 3 through 8.

### Sample Purpose and Nonpurpose Statements

*Group:* Data liaisons will examine school and district and student/staff data and will make recommendations for staff development priorities.

*Purpose:* This group will make recommendations to the superintendent's cabinet regarding ways to improve the recruitment, selection, and induction procedures for new employees.

*Nonpurpose:* This group will not discuss the costs necessary to recruit needed staff.

*Group:* The Learning Team will examine school and district and student/staff data and will make recommendations for staff development priorities.

*Purpose:* The Learning Team will prepare a long-range district plan for staff development.

*Nonpurpose:* The Learning Team will not challenge the state requirements for licensure.

*Group:* The district leadership team is working to pass a bond levy.

*Purpose:* To get one more vote than the opposition.

*Nonpurpose:* To energize the opposition.

## HANDOUT 1.2: ANALYZING GROUP COMMITMENT

### Directions

Using a four-point Likert Scale, ask participants to assess their commitment to the purpose of the team. The information can then be examined in light of how all members view the group's purpose/goals and how they have been formulated.

| *Statement* | *Strongly Agree* | *Agree* | *Disagree* | *Strongly Disagree* |
|---|---|---|---|---|
| 1. I support the purpose of this team. | | | | |
| 2. The purpose of this team is clear. | | | | |
| 3. I had an opportunity to formulate or influence the purpose of this team. | | | | |
| 4. The team periodically reviews and revises its goal. | | | | |
| 5. The purpose of this team meets my individual needs. | | | | |
| 6. The purpose of this team meets an organizational need. | | | | |
| 7. The team has the capacity to accomplish this goal. | | | | |
| 8. I can clearly state the purpose of this team. | | | | |

SOURCE: From *Building Systems for Professional Growth: An Action Guide*, by Margaret A. Arbuckle and Lynn B. Murray, Regional Laboratory for Educational Improvement of the Northeast & Islands, 1989. 

Give careful thought to who needs to be invited to the group. Effective work depends on members' blend of skills and knowledge, their backgrounds and personalities, and the level of commitment they bring to the project. The group must also be structured to represent the necessary stakeholders.

## Decide on Group Characteristics

The planning group begins to form the working group by discussing and deciding on key characteristics:

• *Size.* Different-sized groups have advantages and disadvantages, some of which are represented in Table 1.1. The most important determinant of group size is that the number allows for representation of appropriate roles, responsibilities, and perspectives. Provide a range for the ideal number in the group to allow some flexibility as the group is assembled.

**Table 1.1** Advantages and Disadvantages of Group Sizes

| *Group Size* | *Advantages* | *Disadvantages* |
|---|---|---|
| 2–7 | • Easy to assemble quickly<br>• Informality is possible<br>• Flexible and creative<br>• Group dynamics are manageable | • May have limited viewpoint<br>• Numbers may not exist for the group to have more creative ideas |
| 8–15 | • Most conducive to synergy<br>• Everyone can participate<br>• Can be informal and spontaneous | • Complexity of group dynamics increases<br>• Consensus may take longer<br>• Needs facilitator and recorder |
| 16–30 | • Ideal for information sharing<br>• Provides opportunities for information sharing<br>• Increases potential for ownership and commitment<br>• Provides larger number of potential leaders for various projects<br>• Ensures anyone who wishes to serve has the opportunity | • Requires a facilitator<br>• Needs ground rules<br>• Needs small work groups to keep everyone involved<br>• Needs to change small work groups often to prevent powerful cliques from forming |

• *Diversity.* Representation is critical in forming the group. Include representatives from all areas of the organization that could be affected by the group's decisions. Consider the following:

- Gender
- Years of experience
- Types of experience
- Race
- Ethnicity

Also consider people who have different roles, titles, and experiences and who work in different parts of the system and at different levels of authority. W. Patrick Dolan (1994) refers to this as "constituency engagement" or "diagonal" team planning. Consider the following criteria:

– Organizational level (site based, departments, central office)
– School level (preschool, elementary, middle, high school, adult education)
– Assignment (administrative, teaching, support staff, paraprofessional, etc., as well as teaching assignment, such as core teachers, special education, special subjects)
– Geographic/regional representation
– Community representation

• *Skills and Expertise.* The collective expertise within the group will determine its ultimate success. Determine the kinds of expertise the group needs. For example, if the group is responsible for developing a comprehensive math/science grant application, participants might include representatives from curriculum development, professional development, school-based leaders, math and science teachers, program evaluators, and the finance department.

Discuss who can provide the process as well as the content skills necessary to accomplish the goals. The group might need a skilled facilitator, for example, if no one on the planning team fills that role. Someone with particular knowledge of research relevant to the group's purpose or expertise in collaboration might be what the team needs.

## Clarify the Selection Process

Determine who needs to be at the table and how you will find those individuals. Participants may be targeted as follows:

• *Invited.* The advantage of inviting group members is that the planning group or group chairperson controls the membership. A disadvantage is that some of those who might be interested in the group's work could be excluded. Others might be disappointed not to be asked to participate.

• *Appointed.* School or system leaders may want to be involved in the group's work by appointing members. The advantage of appointing members is that since the invitation comes from higher-ups, invitees might feel a certain prestige at being asked to serve. Disadvantages are the same exclusions that occur with invited participation.

Another way to appoint members is identify groups that need to be represented and invite the leaders to appoint participants to represent their groups. For example, say the planning group decides it wants representative teachers and parents. The group asks the professional association/union president to identify teachers from the association, department, or grade-level chairpersons to identify department representatives and asks the Parent Teacher Association president to select parent representatives.

• *Volunteers.* Soliciting volunteers who meet the preestablished criteria for membership is another option. A disadvantage of this process is the disappointment caused when individuals who volunteer are not selected to serve. However, the commitment of those who do serve is greater since they ask to be part of the group.

A different option in selecting volunteers is to explain the membership requirements, such as having a certain stated expertise, attending regular meetings, completing prework assignments, and committing to a consensus process, then allowing all to serve who agree to meet the requirements. The chairperson must be prepared to use a facilitator if the group's size becomes too large.

Another idea is to announce a meeting and allow anyone attending to become part of the group. If the group needs greater diversity, members can solicit others to join.

## Solicit Nominations

Whether members are invited or volunteer, it is useful for the group to have strategies for determining who should be part of the work. Several steps can aid in this process. The planning team may wish to create a nomination form for potential volunteers or invitees to submit. The form can provide the group with the information necessary to help select the final group members.

Make sure that the nomination form includes questions about the key areas the planning group discussed as necessary criteria for involvement, such as the individual's background, role, expertise, and skills.

## Rate Your Candidates

Develop a matrix to help visualize who is at the table and potential members' balance of strengths. Create similar matrices whenever a new group is being formed and specific criteria need to be addressed. (See Handout 1.3: Sample Matrix of Selection Criteria.)

After filling in and reviewing the matrix, the planning group might find that specific needs have not been met for the group. Planners may want to develop an individual job description for that need. For example, a school leadership team might announce,

> We are seeking a community member to serve on the school leadership team. The representative will be someone who is a recognized community leader, an effective facilitator, an advocate for positive change, and willing to serve as the "healthy skeptic." A background in research and evaluation would be helpful.

The planning group then can let others know the group's specific needs. Be careful to maintain confidentiality for all documents.

## HANDOUT 1.3: SAMPLE MATRIX OF SELECTION CRITERIA

Each team can prepare a matrix detailing criteria to ensure that the right people serve on the team. You can create a "job description" to assess potential candidates against the criteria. When the planning team meets, they can identify the needs of the project and clarify the expectations of the group participants.

In this example, a school leadership team is being formed. It might be helpful to include a person who has the following characteristics:

- Is willing to take on additional leadership responsibilities
- Is able to analyze and interpret data
- Is willing to commit to additional professional development
- Is a recognized school/community leader
- Is an effective facilitator
- Is able to engage others to achieve the school goals
- Values processes for planning, implementing, monitoring, and evaluating results
- Is an advocate for positive change
- Has expertise in writing grants
- Serves as the "healthy skeptic"
- Is a team player

| *Criteria* | *Dwayne* | *Ellen* | *Sharon* | *Jay* | *Denny* |
|---|---|---|---|---|---|
| Is willing to take on additional leadership responsibilities | | | | | |
| Is able to analyze and interpret data | | | | | |
| Is willing to commit to additional professional development | | | | | |
| Is a recognized school/community leader | | | | | |
| Is an effective facilitator | | | | | |
| Is able to engage others to achieve the school goals | | | | | |
| Values processes for planning, implementing, monitoring, and evaluating results | | | | | |
| Is an advocate for positive change | | | | | |
| Has expertise in writing grants | | | | | |
| Serves as the "healthy skeptic" | | | | | |
| Is a team player | | | | | |

## Finalize the Membership

If the planning group is selecting members, finish the work by having members consider some key questions:

- Do team members have the expertise and authority needed to carry out the task?
- Are all individuals who have a stake in the team's decisions included?
- Do team members' personalities and styles balance?
- Would these individuals have a personal interest or stake in the team's work?
- Which levels of the organization are represented, and how will the different roles affect the team?

If members are being appointed, send official notification of the appointment from a leader in the organization (see Figure 1.1).

When group members are being invited or volunteers are selected, ask the chairperson of the planning group to write or speak with the potential members. Let them know the benefits of being part of the work. As part of the group, they will have the following opportunities:

- To influence the direction of the organization
- To work with esteemed colleagues
- To actively participate in professional development associated with group work

**Figure 1.1** Sample Letter of Appointment

Dear Sam,

Congratulations on your appointment to serve on the curriculum-mapping team for K–12 mathematics. Your leadership and commitment to staff development as a math coach contributed to your appointment and recognition by the Division of Curriculum and Staff Development for this honor.

We look forward to working with you over the next 18 months on this important task. We trust you will find the work a learning experience and pleasurable responsibility. You will be working closely with our associate superintendent for curriculum, a state advisor, and other K–12 district math experts. They will provide the support necessary to make this a model process.

Thank you again for accepting this appointment. Math teachers throughout the district will benefit from the leadership you offer the organization.

Sincerely,

Joseph F. Frazier

Cc (Superintendent's name)

Finally, ask the chairperson of the planning group to send members a separate letter identifying financial agreements, acknowledging how they will be reimbursed for expenses associated with the group work and whether they will be paid for their time. Be sure to discuss any financial aspects of their involvement at the initial group meeting.

### Plan for Ways to Replace Members

When a member leaves the group, choose new members based on the skills and expertise needed by the group. If the group's responsibilities change or grow, the group may have to add new members who have skills and expertise in areas that meet the new needs.

### Determine Whether the Group Will Have a Chairperson

Discuss whether the group needs a chairperson. Some chairs are appointed by the group or the individual responsible for forming the group. Some become chairpersons because of their positions outside the group, such as school leader. Determine how the group will select a chairperson if necessary.

## BUILD THE AGENDA

According to a MCI Conferencing (1998) white paper, three out of four respondents consider having a prepared agenda extremely important to any meeting. The study also found a direct correlation between preparation, particularly of the agenda, and meeting productivity.

Developing an effective agenda is a skill. A well-planned agenda lets participants know the goals of the meeting and the steps the group will take to achieve it. It is a roadmap for the time the group will spend, a reminder afterward of what occurred, and a planning tool for follow-up action.

An online survey found that the main reasons employees dread meetings is that the work doesn't lead to decision; participants aren't prepared; the meeting doesn't start or end on time; and the agenda isn't followed (Bertagnoli, 1999).

A well-prepared agenda clearly states the meeting's objective, issues to be discussed, beginning and ending times, location, participants, and what is expected of each in preparing for the meeting. The agenda is the tool for creating a meeting that works. It is designed to ensure that the group is both effective and efficient.

**Tip:** Vary the meeting time for a standing group to maintain interest. Survey the group to determine their preferred times, dates, locations, and methods for communication (e-mail, mail, phone call, etc.).

## Include Key Elements

The best agendas include several main components:

- *Topic.* A brief description of the issue or item to be discussed.
- *Responsible Person.* The person who will lead the discussion of the topic. This does not imply the person who will manage the initiative; it does acknowledge who will facilitate the process during the meeting.
- *Desired Outcome.* The goal or purpose so that the facilitator and team members clearly understand what must be accomplished. This is the most important element of the agenda. The desired outcome is written as a neutral statement, not one that seems to predict or predetermine the outcome of the discussion. For example, the desired outcome statement would not be "Approve offering university credit for conference attendance." Instead, it would be phrased "Determine whether to offer university credit for conference attendance."
- *Timeline.* The amount of time allotted to the issue. To keep the group on task, reference the actual hour and minutes rather than a generic number of minutes. For example, write "9:45 a.m. to 10 a.m." rather than "15 minutes." The clock will keep you on target, whereas the number of minutes can lead to sloppy time-keeping.
- *Members' Involvement.* Notations identifying the expected involvement from group members. For example, (I) might indicate an information item, (D) a discussion/dialogue item, (A) an action item, or (DP) a decision point. Items might be grouped together under a heading on the agenda.

These key elements are universal, no matter what format the agenda takes.

## Review Alternate Formats

Three modified agenda formats are available in handouts. (See Handout 1.4: Purpose/Nonpurpose Agenda Format; Handout 1.5: Contemporary Agenda Format; and Handout 1.6: Boxed-Agenda Format.)

- *The purpose/nonpurpose agenda* planning format helps the team stay focused by specifying issues that will and will not be discussed.
- *The contemporary agenda* format is most useful for an established group with clearly understood rules and ground rules.
- *The boxed-agenda* format is a more traditional form. By listing desired outcomes, it can help groups in the earlier stages of development follow the format.

*(Text continues on page 21)*

## HANDOUT 1.4: PURPOSE/ NONPURPOSE AGENDA FORMAT

Although the team will have clarified the purpose and nonpurpose during the process of establishing the team, it is always good to review these items with the team during the initial meeting(s). Ensure that there is agreement on the purpose and nonpurpose.

At this time, discuss the types of agenda items that will be included and those that will be avoided or forwarded to another work group.

Team:

Members:

Date:

Purpose of the group:

Types of agenda items that will be considered:

Nonpurpose of the group:

Types of agenda items that will not be considered:

## HANDOUT 1.5: CONTEMPORARY AGENDA FORMAT

Group:

Participants:

Date: ________________ Time: _________________ Location: ____________________

| *Item* | *Type* | *Person Responsible* | *Time* | *Desired Outcome* |
|---|---|---|---|---|
| Welcome, Continental Breakfast | | | 8:00 | |
| LEARNING:<br><br>Application | D | Sue | 8:30 | Discuss how to use ideas from *Making Meetings Work* as part of our team work. |
| Purpose | A | MaryJo | 9:30 | Review the purpose/nonpurpose statements. Make a commitment to the priorities. |
| Retreat | A | Dudley | 10:00 | Choose the location for the summer retreat. Identify and agree to the themes for the retreat. Seek volunteers to serve on the planning team to design the summer retreat. |
| Break | | | 10:45 | |
| Committee Reports | D/A | Kelli<br><br>Patrick<br><br>Ann | 11:00 | Present the latest news from each of the standing committees.<br><br>Determine next steps. |
| Strategic Plan Report<br><br>Action Team Reports<br>Annual Update<br>Evaluation of Plan | D | Amy | 1:00 | Share action plan reports. Introduce the format for the annual update. Determine how to evaluate the plan. |
| Debrief | D | Josh | 2:45 | Discuss progress made during the day.<br>Critique attention to the purpose and the norms.<br>Complete plus/delta. |
| Next Steps<br>Wrap-up | A | Vanessa | 3:00 | Define next steps.<br>Identify topics for next meeting. |

Attachments:
Committee Reports:
Articles:
Schedule:

## HANDOUT 1.6: BOXED-AGENDA FORMAT

Agenda:

Team:

Participants:

Date/Time: ____________________ Location: ____________________

Chairperson: ____________________ Facilitator: ____________________

Recorder: ____________________ Time Keeper: ____________________

Next Agenda Builder: ________________________________________

Purpose of Team:

| *Topic* | *I/D/A** | *Desired Outcome* | *Facilitator* | *Start Time*+ |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

*I: Information, D: Discussion, A: Action/Decision Point

+Clock Time

***Bring Your Calendar***

Discuss with the planning group the pros and cons of each sample format. Use the ideas from these samples to modify the format to meet the group's needs, but retain the key elements.

## Decide Who Sets the Agenda

Initially, a planning group or facilitator may decide the agenda for a meeting. If the group is an ongoing group, provide an opportunity for members to discuss how future agendas will be set.

The agenda can be determined by the group leader or facilitator, or it can be developed by a representative committee or individual.

Some groups leave developing the agenda to the group leader. If the leader has the task of preparing the agenda, some participants will feel that the old model of top-down authority is in place. Leaving the task to an effective leader, however, can streamline the process and allow the leader or facilitator to help effectively move the group toward the desired outcome.

Other groups have a subgroup set the agenda. New teams or low-trust teams (teams that for some reason have little trust in the process; for example, their confidence in their leader has somehow been compromised) often put the job of agenda planning into the hands of a representative group. A subcommittee is especially useful when conflicting priorities exist and decisions have to be made regarding the agenda because of limited time. Using a subcommittee to set the agenda takes additional time and coordination.

Some groups decide to delegate authority for the agenda to an individual member. High-trust teams (teams that have built trust in one another and in the process) most often give the job of the agenda builder to one team member. The responsible individual holds a great deal of authority within the group in this way, and this person may face some challenges if conflicts arise over what has been or will be put on the agenda.

Finally, the group as a whole can be involved in setting the agenda. Using everyone's time and attention in this way, however, may not be the most efficient or effective method.

It is important that teams make conscious decisions about how the agenda will be set so that all team members feel they have input and confidence in the process.

## Develop the Content

The content of the agenda can be decided as follows:

- Based on the stated purpose and the identified needs of the group
- Based on participants' input ahead of the meeting
- Decided by group members at the beginning of the meeting or at the end of the previous meeting
- Based on minutes from prior meetings
- Some combination of these styles

## Gather Suggestions

If the group decides to gather input, develop a process to facilitate collecting members' suggestions. Be sure the group is committed to using members' ideas if input is allowed.

Develop a format for participants to submit agenda items. As you develop the format, include areas for responses to these guiding questions:

- What is the topic to be discussed?
- Is the item an information item, a discussion item, or one that needs a decision or action from the group?
- How much time is needed?
- Who is responsible for presenting the issue? Who will lead the discussion?
- What is the desired outcome of the dialogue?
- Are there others who are not members of the group who would be helpful to the discussion and could be invited to be present or participate in the problem solving or decision making?
- What is the rationale for including this topic on the agenda? Is it aligned with the team's purpose?

As a group, decide who is able to submit items for consideration—members only, or others not on the team, such as other faculty, students, parents, and administrators. Set clear deadlines for requests to put items on the agenda. (See sample forms for gathering input: Handout 1.7: Agenda Input Format 1 and Handout 1.8: Agenda Input Format 2.)

> **Tip:** Send the agenda to meeting participants at least 48 hours prior to the meeting to ensure that everyone is prepared.

After reviewing the elements of the different forms, have the planning group discuss their pros and cons and design a format that meets the needs of the members.

Once the group has decided to accept suggestions, it is important for the individual or group deciding whether to include these items on the agenda to follow through. If a topic will not be included on the agenda, provide immediate feedback to the person suggesting the item about what is happening to the item. For example, the topic was forwarded to a subcommittee for further study, forwarded to an individual staff member for his or her action, is being returned for clarification, or did not match the group's identified priorities and therefore cannot be addressed at this time.

Various forms of technology can support the group in gathering agenda input. For example, e-mail could be used to request suggestions from group members. More sophisticated methods of gathering input include electronic polling tools, a discussion board, or an interactive form. Any of these would only be appropriate within an environment where team members habitually use that technology.

## HANDOUT 1.7: AGENDA INPUT FORMAT 1

Topics or ideas for the ________________________________________ meeting

Please send or fax to:

Phone:

Fax:

Name of Person Submitting Topic: _____________________________________

**Check One:**

Information __________ Discussion ___________ Decision/Action ___________

Desired Outcome (a statement of what you hope to accomplish at the meeting)

___________________________________________________________________

___________________________________________________________________

___________________________________________________________________

Others who should be included in the meeting: __________________________

___________________________________________________________________

**Action Taken:**

_______ The topic will be included on the agenda at the meeting on _________________________________. You have __________ minutes on the agenda. Please be prepared with materials for _______ people. Please submit any prework or information for team members to _____________ before ______________. This will ensure that team members are prepared for the discussion.

_______ The topic was forwarded to ____________________________.

_______ The topic, while important, does not meet the stated purpose of this team, so it cannot be considered at this time.

_______ Other: ______________________________________________________

## HANDOUT 1.8: AGENDA INPUT FORMAT 2

Use this format to suggest items for upcoming meetings.

Idea Submitted By:

Name: ______________________________ Role: ___________________________

Phone: ______________________________ Fax: ___________________________

| *Topic* | *I/D/A** | *Desired Outcome* | *Preferred Date* | *Time Needed* |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |

*I: Information, D: Discussion, A: Action/Decision Point

Others who should be present for the discussion: _________________________

_____________________________________________________________________

Use this space to inform the person who submitted the topic for consideration of the outcome. Let him or her know whether the issue will be addressed on an upcoming agenda, was sent to subcommittee, or was addressed in another way.

TO: _____________________________ FROM: ____________________________

| *Topic* | *Disposition* |
|---|---|
| | |
| | |
| | |

### *Impromptu Agendas*

For informal meetings or for those called in the midst of change, building the agenda at the start of the meeting is an effective strategy. The group leader can poll group members at the meeting's start for items they want to cover. Build the agenda from this list, prioritize the issues, and set a limit for the meeting time.

### *Using a "Parking Lot"*

During the meeting, issues may arise that are important but are not part of the current agenda. The facilitator may keep a running list of issues and ideas that are generated on a "parking lot" chart. Facilitators may also keep index cards on the table for participants to record their ideas during the meeting. The parking lot is a public acknowledgment of issues that are not part of the current discussion. Some people prefer to see their ideas recorded on charts as a reminder for later discussion. Others may be happy to have a process for identifying important ideas.

The list of items that have been raised during the meeting may need to be addressed at another meeting. Distribute this list from the parking lot chart or the index cards with the minutes. Those responsible for setting the agenda may find important ideas on this list to place on the next meeting's agenda.

### *A Standing Format*

Some standing groups might use an agenda that follows the same format, for example, approval of the minutes, followed by old business, new business, and evaluation. Other groups have reports from standing committees. Remember to share written reports, minutes, or highlights so that group time is not spent just sharing the data. Instead, invite the standing committees to present issues for decision making or to gather information. Individual group members then can add specific items, either by submitting them to the group in advance in writing or at the beginning of the meeting.

## Create the Agenda

A great agenda is closely tied to the meeting's objective, and participants feel its relevance to the work. Whoever is setting the agenda must anticipate and plan for relevance. Ask three questions:

- To achieve our objective, what do we need to do in the meeting?
- What conversations will be important to the people who attend?
- What information will we need to begin?

Here is a list of ideas for the chairperson or subgroup setting the agenda to consider:

- *Review all suggestions for agenda items.* Decide which to include by asking which will advance the achievement of the team's purpose.

- *Determine which items could be dealt with in another way.* Remember that meetings are often not the best way to share information. You may save a considerable amount of time if you establish consistent alternative processes for information sharing. Save meeting time for dialogue, data analysis, problem solving, and decision making.

- *Analyze items.* Are the items ready to bring to the group? Has the preliminary research been completed? Are the group members sufficiently prepared to discuss the topic? Is there a need for prework, reading, or special reports? Perhaps the item could be submitted to an ad hoc or standing group for further study prior to the full-group meeting. Is the desired outcome clear and written in a neutral tone? The agenda can also be set to get participants involved right away, so they come on time.

- *Decide how long the meeting needs to last to complete the desired outcome.* Determine how many items can be accommodated if the group has previously set a preferred length of time for the meeting.

- *Identify items by category* (information items, discussion items, action items) and cluster topics that are similar.

- *Carefully sequence the agenda items.*
  - Teams or boards that have many decisions to make often begin with a group of consent agenda items. These items are generally more routine in nature and do not require significant discussion. Group a number of action items together for efficiency, but make sure members have the background they need to make a decision on these items as a whole so the vote can be taken quickly at the meeting's outset.
  - The consent agenda includes items such as approval of the minutes of the last meeting.
  - Identify a few items that will help members work together as a group before they face more complex items.
  - Position more important items earlier in the meeting when members are better able to concentrate and be creative. Placing these items toward the beginning also helps in case some members have to leave early or you run out of time later in the meeting for items that need lengthy discussion.
  - Since you want the group to end on a unifying note, move more controversial items to an earlier place on the agenda. Some groups are tempted to put all action items at the end of the meeting, following all of the information sharing and information processing. Doing so puts pressure on the team and may reduce the quality of the dialogue if time becomes short.

- *Prepare a draft of the agenda.* Balance information sharing, discussion, and action items. If information and discussion items are related to an action item, place them together.

• *Send a copy of the agenda to every member of the group prior to the meeting.* Some groups prefer to have the agenda 24 or 48 hours prior to the meeting, and others determine the agenda at the close of the previous meeting. You may also want to make the agenda available to all constituencies by putting it in mailboxes, posting it on bulletin boards, or including it in a weekly bulletin. Include documentation that will help you achieve the meeting goals, such as reports, data, or prework that attendees should complete before the meeting.

• *Include opportunities for learning in the agenda.* As people contribute their expertise, provide opportunities for participants to take home new knowledge to benefit and add value to their own work. Provide an opportunity for members to engage in their own professional development as well as to accomplish the group's desired outcome.

• *Review the agenda-building process and the agenda formats occasionally to make sure the process continues to meet the needs of the group.*

## ARRANGE THE FACILITY

Creating a proper atmosphere is as important for a meeting as it is in entertaining. The room environment and level of comfort will affect everyone's attitude toward the meeting. It is important to carefully consider the arrangements in advance and create a welcoming, positive atmosphere for an environment conducive to working.

I remember facilitating one meeting in which the afternoon sun shone directly into some group members' eyes and the window shades were broken. At another meeting, participants brought their coats because the room was known to have a faulty heating system. In these cases, it was hard for some individuals to focus on the work. Group members are better able to pay attention and participate when they have their physical needs met. Set a tone for the meeting by carefully attending to the following aspects.

### Select a Meeting Room

Considerations such as which day and time and the length and number of times the group will meet will affect your choice of meeting space. Humans are creatures of habit, so it is best to try to meet in the same location, if not always at the same time or on a routine day. That means planning ahead to reserve your space.

If members of the group represent a variety of interests, however, such as a number of different schools, it may be beneficial to rotate the meeting location and have various members host the group. Doing so reminds members of the people whom the work may affect and varies the interest for participants, which can encourage them to attend. In fact, spending a few minutes learning about the location can be a positive experience for group members.

Another main consideration is the group's size. Most rooms will accommodate a group of 12 without too much trouble. It is better to have too much space than to be crowded, so if you have a choice, opt for the larger setting. Consider whether all the participants will be able to see each other, the facilitator, and any speakers who may be invited.

> **Tip:** If you have too large a space, create artificial barriers to help the group fit the room. It helps to select a room that has furniture that can be easily moved.

Also make sure the room will be able to accommodate the work you have planned. For example, if you want to have the larger group break up into smaller groups, choose a setting in which you can set up in advance for both situations. You may want a room that will accommodate a single large group as well as several small groups working simultaneously.

## Study the Room

If possible, spend a few minutes in the meeting room in advance of the meeting day so you have time to think about and plan the room arrangement. Check to be sure you know about aspects of the room that will affect the group's comfort level. The room will also influence the processes and large- or small-group structures that you can use during the meeting. Be sure to know the following:

### *Room*

- Is the size of the room adequate for the different kinds of work you may do and the size of the group?
- Who will open the room? Who has a key?
- Where are the light switches?
- Where are the room temperature controls?
- What is the usual room temperature? Will the room need to be warmed or cooled in advance?
- Where is the nearest building entrance?
- Is the lighting adequate?
- Are there pillars or other things that could block group members' views?
- Is there room for a refreshment area?
- How many tables are in the room, and what shape are they?
- Are there enough chairs?
- Can the furniture be easily moved? Who will arrange it?
- Is there adequate wall space for hanging charts?
- Do you have permission to tape or pin notes to the wall?
- Do windows have shades or other means of controlling the light?
- Is the room located away from high-traffic areas?

### *Equipment*

- Is there a screen?
- Where are the electrical outlets? What power cords will be needed?
- Is there a phone? Is there Internet access?
- Is there a microphone system?
- Is there a SMART board, an LCD projector, or multimedia equipment?
- Are there tables for the equipment, for the refreshments, for the materials, and for the facilitator?
- What other equipment or furniture might be needed?

Use Handout 1.9: Meeting Room Checklist to help you plan and to make notes after the meeting to improve future work.

## Plan the Room Arrangement

Consider the size of the group and the purpose of the meeting. Will group members take notes? They will need tables. Will you work in one group, small groups, or both? Set up separate small-group work areas in advance so participants can move without having to rearrange the furniture. If you want to encourage discussion and dialogue, make sure all participants can see each other clearly.

The way you arrange the room and the tables sends clear messages the instant participants walk in. One square table at the front of the room signals that control resides there. A circle of chairs suggests an informal discussion without any note taking, which might imply little follow-up. Once you've considered your purpose and what the facility can accommodate, make the best arrangement you can.

Possible arrangements (see Figure 1.2) are as follows:

- *Boardroom.* Participants all sit around one large rectangular table. Use this setup with a smaller group who can fit at the table size available, generally 12 or fewer participants. This is a good arrangement for small meetings. The facilitator can work well and be seen from the front of the room. Disadvantages include a limit to the number of people who can be seated at the table, and the shape may imply a certain hierarchy.

- *Hollow Square.* Participants sit on the outside of several rectangular tables that form a square. A hollow square is useful when the only additional visual aid is a chart stand. A larger number of participants can fit in this shape, but it creates more distance between participants, and between participants and the facilitator or group leader.

- *U-Shaped.* Three rectangular tables are used to form a U shape. This setup is desirable when information will be visually recorded, displayed, and used during the meeting. It is convenient for groups of

## HANDOUT 1.9: MEETING ROOM CHECKLIST

**Notes:**

1. **Physical Arrangement**
   - Temperature ________
   - Heating/Cooling control (manual or locked) ________
   - Entrance ________
   - Registration area ________
   - Lighting ________
   - Screen ________
   - Electrical outlets, power strips ________
   - Refreshment area ________
   - Tables ________
   - Chairs ________
   - Phone(s) ________
   - Wall space ________
   - Windows and window shades ________
   - Size of room ________
   - Partitioning ________
   - Types of tables ________
   - Possibilities for seating arrangements ________

2. **Atmosphere** ________
   - Temperature ________
   - Refreshments ________
   - Lighting ________
   - Restrooms ________
   - Comfort of chairs ________

3. **Audio/Visual** ________
   - Television ________
   - VCR ________
   - Overhead projector ________
   - Screen ________
   - Slide projector ________
   - Laptop computer, projector ________
   - Chart paper or Post-It chart paper if tape cannot be used ________
   - Markers, masking tape ________

4. **Resource Materials** ________
   - Welcome sign ________
   - Nametags/name plates ________
   - Paper, pens, pencils ________
   - Minutes from previous meeting ________
   - List of participants ________
   - Sign-in roster, reimbursement forms ________
   - Sample documents, reports, data, background papers ________
   - Working papers of the group ________
   - Menu for ordering lunch ________

up to 20 or so and makes it easy for all to see the leader or facilitator. Participants also are able to see each other. The size of the table may make it less conducive to small-group discussion. The leader or facilitator's movement is limited, and the facilitator is perceived in a power position in a room with this setup. Chairs can be placed on the inside of the U if the group will work in small groups during the meeting.

- *Rounds.* All the participants are seated in small groups at round tables. This is a good arrangement for building a sense of being a team and for encouraging discussion. The leader or facilitator has more freedom as far as where he or she is positioned. A disadvantage is that it may encourage casual discussion, perhaps at inopportune times. Having more round tables also requires a larger room to allow for movement.

- *Herringbone (or V).* All participants are seated in small groups at tables of approximately six, so everyone at the table can see the screen and the facilitator or presenter. The advantage of this setup is the visual access and the table grouping that allows for small-group work and supports conversation.

**Tip:** If someone else will be responsible for arranging the room, give that person a diagram.

## Create a Positive Atmosphere

When the main form for seating has been settled, consider the many finer points of the room's setting. Remember to monitor the room environment when you meet.

### *Lights*

Watch for flickering light bulbs or direct sunlight in people's faces, which can create irritability or cause headaches.

### *Temperature*

Be sure the room temperature is adjusted appropriately prior to the meeting. Stay aware of the room temperature as the group meets. When individuals are too warm or too cold, energy drops.

### *Refreshments*

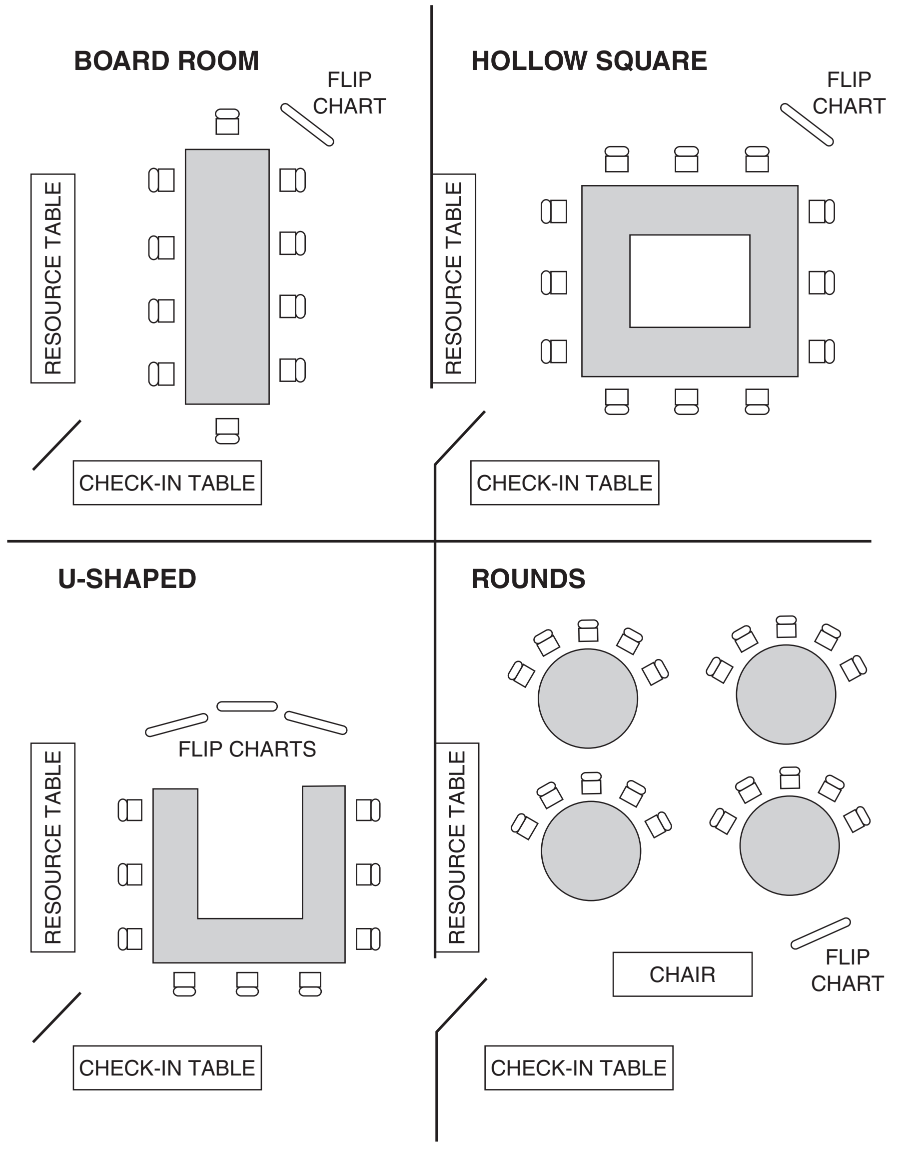
Serve refreshments that heighten rather than "zap" energy. Provide high-protein foods, fruit, juice, nuts, water, and both caffeinated and decaffeinated drinks.

**Tip:** Begin with too few seats rather than too many. Seats can be added if necessary, but empty chairs can become black holes of energy.

### *Comfort*

Let members know the location of the restrooms. Face chairs away from doors and windows when possible.

**Figure 1.2** Room Arrangements




## Gather Equipment and Supplies

Check equipment in advance and know who is available to help if equipment fails or you need additional supplies. Consider what supplies you will need, where you will get them, where you will place them in the room, and who is responsible for bringing the equipment and supplies to the meeting.

Equipment may include the following:

- Television or monitor
- VCR

- Overhead projector
- Screen(s) depending on the size of the room
- Laptop computer, LCD projector, mouse, remote control
- Chart paper
- Tape, pins, markers (use water-soluble markers to reduce odors in the room)
- Extension cords, power strips

The following are some supplies that might benefit the group's work:

- Registration materials
  - Welcome sign
  - Nametags or nameplates
  - Paper, pens, pencils
  - Reimbursement forms
  - University or district credit forms
  - Sign-in roster
  - Menu for ordering lunch
  - List of participants

- Materials for the meeting
  - Agenda
  - Background papers
  - Documents, reports
  - Data that will guide the work of the group
  - Working papers of the group
  - Minutes from previous meetings
  - Articles of interest
  - Books, reference materials

- Refreshments

While it may seem to some that several of these preparatory steps could be shortened or even skipped, they are essential components of the group's success. Someone told me recently that her group didn't need an agenda because members just came in and got to work. After a pause, I congratulated her, then asked her what the group's purpose was and if members ever spent time reflecting on what they had accomplished. Without any hesitation, she said the group didn't have any time for that—they had so much work, they had spent the last year just trying to get to the end, and they still hadn't gotten there.

Without a formalized structure and attention to the details outlined here, the work and the team relationships ultimately suffer. Members can't commit as fully to even attending the meeting if they don't clearly understand their purpose for being there. We all want to know what to expect when we walk into a meeting. We want to know when it will begin, something about the work we will be doing there, and what time we will end. A well-constructed agenda is a roadmap for the work ahead.

We want to be physically comfortable. We want a place to work that is not too cold or overly heated. Like our students, we want to be able to see the board/screen. And we want to know that the right people are in the room to do the work that needs to be done.

Setting up each of these components takes time. The time is better spent up front, before the group actually meets, than in trying to resolve issues that may arise later from a lack of preparation. It is always better to put in the extra preparation time attending to details. That is the difference between a meeting that works and one that falls apart, and between a team that achieves its desired outcome and a group that can't get past discussion.

Preparation is the first key to successful group work. The next key is knowing how to run the meeting well.