

# Chapter 4. Running Effective Meetings

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Why do we need to have meetings? There are many different kinds of meetings and their style can vary, depending on both the nature of the meeting and the approach of the chair. An informal atmosphere encourages everyone to contribute and feel they are part of what is happening, which can be very important. Some chairs like to be very brisk and keep strictly to the agreed timetables while others are more relaxed. There is no single approach and different styles suit different occasions.

Good meetings leave those who have attended feeling that they have achieved something. They understand what has happened and know what has been decided, they have been given a chance to speak when they need to and they have not been unduly hurried. Bad meetings are often disorderly and do not reach clear decisions when needed. They leave those attending feeling frustrated because they have not been allowed to contribute, they have not achieved anything and have wasted everyone's time.

There are plenty of sources of information about how to organise meetings including several websites, e.g. <http://www.seedsforchange.org.uk/about>; and [https://www.ucu.org.uk/media/pdf/0/5/org\\_meeting\\_1.pdf](https://www.ucu.org.uk/media/pdf/0/5/org_meeting_1.pdf)

PPGs may need different types of meeting and this part of the Toolkit will tell you the basics of what you, as someone involved in a PPG, need to know. It is not the last word and if you have other ideas, please share them with us!

## Checklist: Planning, running and following up meetings

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This checklist will help you to organise and run effective and efficient meetings, it will save you time and participants will know what is expected. If you need assistance with any task, please refer to the relevant section in the Toolkit, listed in the 'Help' column.

<b>Preparation</b>	<b>Resp.</b>	<b>Done</b>	<b>Help</b>
Decide the form of the meeting (in person/phone/web conference)	Chair		4.1
Set meeting date, and start/end time: <ul style="list-style-type: none"> <li>Set agenda for next meeting</li> <li>Distribute agenda and invite members to submit additional items</li> </ul>	Chair & Sec.		4.1
Book venue and refreshments	Sec.		4.1
Distribute agenda and provide supporting material in good time: <ul style="list-style-type: none"> <li>If possible, a week before is a good timescale to work to (although some PPGs may find it better to send all papers out in one mailing)</li> <li>Ensure papers are sent to everyone, attendees and those who have sent apologies</li> </ul>	Sec.		4.1 4.2 4.3
Designate one person to take notes during the meeting (you could consider rotating this function)	Sec.		4.4

<b>Actual Meeting</b>	<b>Resp.</b>	<b>Done</b>	<b>Help</b>
Start on time	Chair		4.2
Ask for apologies, confirm the agenda and ask for notification of any other business	Chair		4.4
Follow the agenda: <ul style="list-style-type: none"> <li>Get agreement on the accuracy of last minutes</li> <li>Stay to time</li> <li>Stay focused on agenda items, if other topics arise, note for the next meeting or at the end if there is time</li> </ul>	Chair		4.3 4.4
Provide updates on tasks from previous meetings, if any	Chair		4.4
Summarise at the end of each item, so decisions, actions and follow ups are clear and assigned	Chair & Sec.		4.4
Confirm date of next meeting	Chair		4.4

<b>Follow-up</b>	<b>Resp.</b>	<b>Done</b>	<b>Help</b>
The chair and secretary/minute-taker should agree the minutes as soon as possible. Minutes then distributed to others present. Minutes should be made available to all members	Chair & Sec.		4.4
If required, communicate tasks to task owners not present at the meeting	Sec.		4.4
Track tasks and follow-up if not completed by due date, especially if due on the agenda at the next meeting	Chair		4.2
File minutes in a place where you and others can easily find them, both physical and virtual	Sec.		

## 4.1 Planning your meeting

Meetings require planning in order to be successful and the following points are given for your consideration before the meeting is called.

### 1. Planning the time and venue

- Pick a date, time and suitable place that is convenient to all attendees
- Reserve all resources needed for the meeting in advance (e.g. room, projector, flip chart, etc.)
- Arrange refreshments if required

### 2. Meeting invitations and agenda

- State the meeting objectives clearly
- For committee/steering groups and similar meetings, limit the invitees to those who need to be there; for other meetings arrange publicity and notify invitees in good time (three - four weeks for public meetings)
- Provide a specific agenda that includes:
  - Location
  - Topics, speakers and time to be spent on each topic
  - List of invitees (depends if it is an open or small steering group meeting)
  - The following roles assigned: chair/minute taker
- Get feedback about the agenda before the meeting; invite additional agenda items, and comments from those unable to attend the meeting
- Refer to section 4.3 for tips on setting an agenda

#### LOCAL CASE STUDY

Consider asking for tabled questions so that the Practice can provide answers in time for the meeting, as the Paxton Green Group Practice does.

### 3. Materials

- Provide review materials sufficiently in advance of the meeting so that attendees can give them proper consideration – at least one week, preferably two weeks
- Bring copies of necessary materials to the meeting for those who may forget
- Make invitees responsible for agenda items assigned to them
- Set the expectation that invitees will arrive prepared

### 4. Ground rules

- At the first meeting, establish ground rules for all meetings, such as:
  - Meetings will start on time
  - Mobile phones must be silent
  - Attendees are expected to listen to others
  - All present will be courteous and not personal
  - No sidebar conversations; one person speaks at a time through the chair of the meeting
  - Invitees will respond to meeting invitations in a timely manner so the chair can assess the viability of having the meeting
  - While it is acceptable to draw on one's own experiences, meetings are not a forum for individual complaints and personal issues

### **Some tips to consider**

- Timing for meetings should take into consideration people's work and carer responsibilities. It may be helpful to alternate the days that meetings are held, including on the weekend
- Think about timing due to the various full time roles held e.g. end of day 4pm onwards can work, or first thing at 8 am before the start of working days
- Can you use software to poll for meeting attendance? Doodle Poll or similar
- Does the meeting need to be run in person – could it be held virtually? Skype/Go to Meeting or similar

## 4.2 Running effective meetings

Effective meetings leave you energised and feeling that you've really accomplished something.

What makes a meeting effective? This really boils down to three things:

1. They are relevant and achieve the meeting's objectives
2. They take up no more than the necessary amount of time
3. They leave participants feeling that a sensible process has been followed and that they have participated/contributed when they want or need.

If you structure your meeting planning, preparation, execution, and follow up around these basic criteria, the result will be an effective meeting.

### 1. The meeting's objective

An effective meeting serves a useful purpose. This means that by holding the meeting, you achieve a desired outcome. For a meeting to meet this outcome, or objective, you have to be clear about what it is.

Too often, people call a meeting to discuss something without really considering what a good outcome would be. Things to consider include:

- Do you want a decision? Do you know what the choices are?
- Do you want to generate ideas?
- Are you getting status reports?
- Are you communicating something?
- Are you making plans?

To help you determine what your meeting objective is, complete this sentence:

*At the close of the meeting, I want the group to .....*

With the end result clearly defined, you can then plan the content of the meeting, and determine who needs to be present.

### 2. Use time wisely

Time is precious, and no one wants their time wasted. With the amount of time we all spend in meetings, you owe it to yourself and your team to streamline the meeting as much as possible. What's more, time wasted in a meeting is time wasted for everybody attending.

Starting with your meeting objective, everything that happens in the meeting itself should further that objective. If it doesn't, it's superfluous and should not be included.

To ensure you cover only what needs to be covered and you stick to relevant activities, you need to create an agenda. The agenda is what you will refer to in order to keep the meeting running on target and on time. Refer to section 4.3 for tips on setting an agenda.

#### *Preparing information beforehand*

Your agenda will arm you with an idea of what needs to be covered and for how long. You can then look at the information that should be prepared beforehand. What do the participants need to know in order to make the most of the meeting time? And, what role are they expected to perform in the meeting, so that they can do the right preparation?

If it's a meeting to solve a problem, ask the participants to come prepared with a viable solution. If you are discussing an ongoing project, have each participant summarise his or her progress to date and circulate the reports amongst members. Assigning a particular topic of discussion to various people is another great way to increase involvement and interest. On the agenda, indicate who will lead the discussion or presentation of each item.

#### *Keeping to time*

Use your agenda as your time guide. When you notice that time is running out for a particular item, consider hurrying the discussion, pushing to a decision, deferring the discussion until another time, or assigning it for discussion by a subcommittee. If extra time is needed to continue the discussion, the chair should ask for permission to adjust the timings of the agenda and allocate a set amount of additional time.

An important aspect of running effective meetings is insisting that everyone respects the time allotted and the chair's role to manage discussion. The chair of the meeting should move or end discussions when it is clear that all the points have been made and the discussion is exhausted. Start the meeting on time, do not spend time recapping for latecomers, and, when you can, finish on time.

Whatever can be done outside the meeting time should be. This includes circulating reports for people to read beforehand, and assigning smaller group meetings to discuss issues relevant to only certain people. Circulating an annotated agenda or notes on specific points to be covered saves time at meetings and ensures that those attending have the relevant background.

### **3. Satisfying participants that a sensible process has been followed**

Once in the meeting, to ensure maximum satisfaction for everyone, there are several things you should keep in mind:

- Make sure everyone has the opportunity to contribute and if certain people are dominating the conversation, you can put them on hold and make a point of asking others for their ideas

- At the end of each agenda item, quickly summarise what was said, and ask people to confirm that it's a fair summary. Then make notes regarding follow-up
- Note items that require further discussion
- Ensure the meeting stays on topic
- List all tasks that are generated at the meeting. Make a note of who is assigned to do what, and by when
- At the close of the meeting, quickly summarise next steps and inform everyone that you will be sending out meeting minutes.

After the meeting is over, take some time to debrief, and determine what went well and what could have been done better. Evaluate the meeting's effectiveness based on how well you met the meeting's objective. This will help you continue to improve your process of running effective meetings.

### Dealing with a vocal member

Sometimes a particular member can be unduly vocal at a meeting, commandeering too much attention and time. It is important to manage such a situation to stay in control of the meeting and ensure all attendees can be heard.

Here are some helpful steps you can take:

1. Interject and tell them that you only have one more minute to spend on this matter before you must move on
2. Thank them for their contribution and then remind them that it's important we also hear other people's opinions, and then immediately invite another attendee to share their view/move on to another topic
3. If their behaviour is repetitive, have a private discussion after the meeting, thanking them for their involvement but reminding them that they must equally share the floor time with others
4. Point them to the PPG Code of Conduct if necessary to remind them of the expected behaviours of the group.

### Top tips for chairs

- **Prepare** - be well briefed about each item on the agenda before the meeting, and actions taken since the last meeting
- **Communicate**
  - Start the meeting. Welcome new members and make necessary introductions
  - Receive apologies for absence
  - Ensure that additions or amendments to minutes are recorded
  - Set the scene. State the objectives of the meeting and of each item
  - Inform attendees that any items/issues that arise during the meeting that are not on the agenda will be moved to Any Other Business, or noted to discuss at the next meeting. It can be useful to write new

- issues arising on a “Matters for Another Meeting” page on a flipchart, so attendees know the issue will be addressed at a later date
- Avoid talking too much, the role of the chair is to facilitate and manage discussion, try to be brief when making a point
  - Listen actively and maintain rapport with participants
  - **Control** - maintain control of the meeting, while allowing flexibility and freedom of expression
  - **Coax** – ensure full participation by all attendees, and be the one who is prepared to ask awkward questions
  - **Compare** – be impartial to people’s opinion and weigh up arguments fairly
  - **Clarify** – ensure everyone understands what is being discussed (including jargon and abbreviations) and summarise decisions along with their deadlines and allocated responsibility as they are made
  - **Guide** – above all, you are there to guide the meeting and steer members to working together harmoniously and purposefully as a team.

### Key points

- Running an effective meeting is more than sending out a notice that your team/group/committee is to meet at a particular time and place. Effective meetings need good planning, structure and order. Without these elements they can go on forever and not accomplish a thing
- With a solid objective in mind, a tight agenda, and a commitment to involving the meeting participants in the planning, preparation, and execution of the meeting, you are well on your way to chairing great meetings
- Given the frustration most people feel when their time is wasted, gaining a reputation for running efficient and successful meetings is good for you and your team/group/committee and will help encourage people to attend future meetings.

## 4.3 Setting the agenda

The agenda should be planned between the chair, secretary and other necessary members of the steering group.

To prepare an agenda, consider the following factors:

- Items from last meeting – if matters require further discussion, ensure they have an allotted space on the agenda
- Priorities – what absolutely must be covered?
- Results – what do you need to accomplish at the meeting?
- Participants – who needs to attend the meeting for it to be successful?
- Sequence – in what order will you cover the topics?
- Presenters – who will lead each item on the agenda?
- Purpose – identify which agenda items are for information, discussion or a decision
- Timing – how much time will be spent on each topic?
- Date and Time – when will the meeting take place?
- Place – where will the meeting take place?
- Perhaps you would like to include a presentation by somebody within or outside the Practice that would be of interest to members

### Inviting feedback

Once you have an agenda prepared, you need to circulate it to the participants who have agenda items to contribute. Running a meeting is not a dictatorial role: you have to be participative right from the start.

Perhaps there is something important that a meeting attendee has to add. Maybe you have allotted too much, or too little, time for a particular item. Whatever the reason, it is important you get feedback from the meeting participants about your proposed agenda before the meeting.

### Background papers

Ensure all necessary background papers (including the last meeting's minutes) are sent out with the agenda before the meeting.

## 4.4 Taking meeting minutes

The minute taker needs to be familiar with the topics being discussed in the PPG meetings. You cannot minute effectively what you do not follow or understand.

Check in advance with the Chair as to the format conventions to be applied - narrative, action, resolution. Note that some meetings adopt the convention of never referring to a speaker by name, instead using an impersonal construction: "It was suggested that..." or "Strong reservations were expressed about..." Make sure you know the adopted conventions before you start.

Sometimes feelings run high in meetings and members say things in the heat of the moment which they would consider ill-advised in calmer moments. No one will thank you for highlighting such moments in painful accuracy. In these cases, it is both diplomatic and prudent to convey the sentiment and not precise words.

Minute-takers learn how to condense lengthy and sometimes digressing discussions with phrases like: "After a general discussion it was decided to..."

### **Before the meeting:**

Agree with the chair what sort of minutes are required. Ideally, minutes should record decisions and not discussions but there are many occasions when a summary record is needed of the arguments that have been made.

- Is the meeting an informal one that will just require a few notes to be circulated around attendees, or will formal minutes be required that have a wide circulation (for example, published on the GP practice's website, or circulated to all PPG members or all registered patients)?
- Check what is required beforehand if you are unsure, and if this is a new meeting for you, ask if you can see copies of previous minutes to get an idea of style and presentation.

Familiarise yourself with the agenda, attendees and any papers so that you know what is going to be discussed and by who.

Decide how you will best be able to take minutes – pen and paper or on a laptop?

Remember to bring spare pens and a few sheets of papers just in case of laptop failure.

If you are worried about not being able to concentrate for the length of the meeting, consider using a voice recorder (but ask attendees if they mind first). However, be aware that it can be quite painful to listen back to a long meeting.

**During the meeting:**

Your aim is not to get everything verbatim or provide a blow-by-blow account of the discussion – concentrate on getting the key discussion points, decisions and actions down, including who any actions are assigned to and if there is a deadline. This means that you will need to listen to everything being said, but be selective over what is written down; if you are unsure, make a note anyway as it can always be edited out when you type up your notes.

If something is unclear in the meeting or a series of decisions are taken very quickly and you are unsure if you got them all, ask the Chair to review the key points either in or immediately after the meeting while things are still clear in their memory.

If you are going to be taking a lot of minutes, it is a good idea to develop abbreviations or notations that allow you to get recurring items down quickly and that will make sense to you later. This allows you to keep up with a fast moving discussion.

In the meeting minutes, ensure you spell a term in full before introducing its abbreviation or acronym.

**After the meeting:**

It is a good idea to set time aside soon after the meeting so you can concentrate on getting your minutes done while the discussions are still fresh in your mind. Aim to get any minutes to the Chair within one week of the meeting ending wherever possible – the longer you leave it, the harder it becomes!

Always maintain the confidentiality of your draft minutes until the Chair has approved them.

Once the minutes are agreed, circulate to all PPG members and to all involved parties, including public forums if appropriate (a member of the GP Practice may post them on the website, or circulate them to an email distribution list). This is a great way to be transparent and show the practice that their PPG members are working on things and being active as a group. You may need to wait until the minutes have been approved at the next meeting before circulating them widely.

Finally, ensure the minutes are saved in a logical, consistent way, so they can be accessed and circulated whenever necessary. Details of dates are essential and should be included in any file names that you use.

**LOCAL CASE STUDY**

The Clapham Park Group Practice shares meeting summaries and achievements on their PPG noticeboard and in their Newsletter.