

MODULE 8

Facilitating With Technology

TRAINING NOTES

What you need to know

1. It will take approximately 1 hour to complete the following topics in this module.

| TOPIC |
|------------------------------------------------------|
| Module Overview |
| The Meeting Model |
| Technology-Enhanced Meetings |
| Exercise: Challenges of Technology-Enhanced Meetings |
| Facilitating with Technology |
| Moderating Panel Discussions |
| Module 8 Key Points |
| Exercise: Reflection |

2. The equipment and supplies you will need for this module are listed below:

- Computer projection system and screen
- PowerPoint slides 8-1 through 8-7
- Small size Post-It™ notes
- Handout 8-1: Challenges of the Audioconference Meeting. Prepare six copies.
- Flipchart easel with pad of paper
- Colored markers
- Masking tape
- Facilitator Guide
- Participant Guides.

3. Prepare a flipchart as illustrated on page 8-66 for the discussion on moderating panel discussions.

TRAINING NOTES

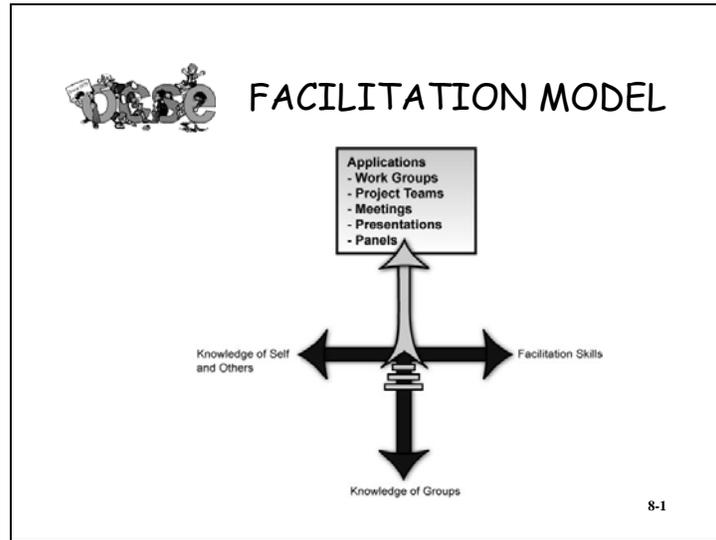
What you need to say/do

MODULE OVERVIEW

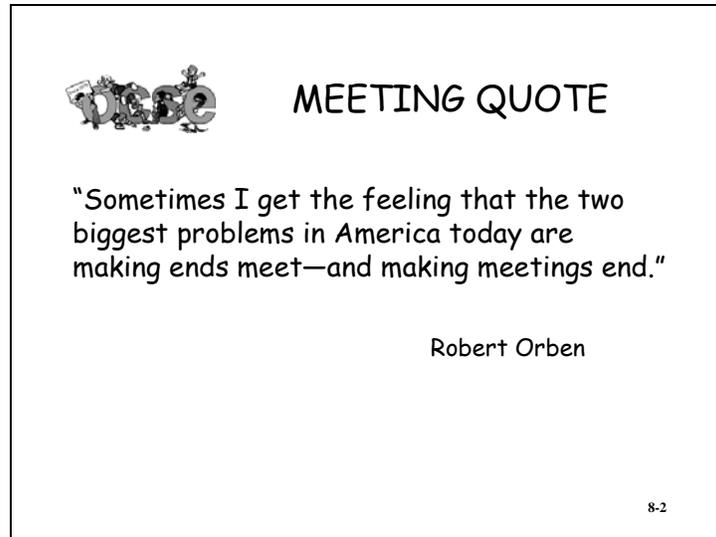
1. Tell the participants that so far in the workshop we have focused on the skills and knowledge that help them become more effective facilitators.
2. Show slide 8-1, **Facilitation Model**. State that the skills and knowledge they've gained will not only enhance their effectiveness when working with their groups or project teams, but also when facilitating meetings. This module gives them information on the principles of effective meetings.
3. Explain that other applications of their facilitation skills and knowledge are giving presentations and moderating panel discussions.
4. Explain that the primary focus of module 8, however, will be on how to facilitate meetings that use audio- and videoconferencing technology.
5. Ask the following question:

“How many meetings would you say you attend on a weekly basis?”
6. State that meetings are a fact of life in most organizations. However, far too many meetings are ineffective. They are poorly planned and conducted and therefore do not achieve the desired outcomes.
7. Show slide 8-2, **Meeting Quote**. State that effective meetings take preparation and good facilitation skills. It's not only important to end meetings on time (*point to the slide*) but to ensure that the time between the beginning of the meeting and its end is time well spent.

MODULE 8: FACILITATING WITH TECHNOLOGY



This part of the workshop will focus on the specific situations in which you apply your facilitation skills and knowledge.



Meetings are an important part of an organization's life. Not all meetings, however, are effective. Often little or no preparation is done and the meetings are poorly conducted. As a result, they do not achieve the desired outcomes and are a waste of people's time and energy.

(Participant Guide 8-1)

TRAINING NOTES

What you need to say/do

MODULE OVERVIEW, CONTINUED

8. Explain that the module's learning goal is to increase participants' understanding of how to facilitate effective meetings, particularly those that involve the use of audio- and/or videoconferencing technology.
9. Show slide 8-3, **Module 8 Objectives**. Review the objectives.
 - After a brief lecturette, you will identify the steps in a meeting model.
 - Through a group activity, you will identify the challenges of facilitating meetings that use audio- and/or videoconferencing technology and tips for overcoming these challenges.
 - Through readings, you will identify guidelines for moderating panel discussions.

MODULE 8: FACILITATING WITH TECHNOLOGY, CONTINUED

Learning Goal

This module's learning goal is to increase your understanding of how to facilitate effective meetings, particularly those that use audio- and/or videoconferencing technology.



MODULE 8 OBJECTIVES

- Identify a meeting model
- Discuss the challenges involved in facilitating "technology-enhanced" meetings and ways to overcome these challenges
- Identify guidelines for moderating panel discussions



8-3

Learning Objectives

- After a brief lecturette, you will identify the steps of a meeting model.
- Through a group activity, you will identify the challenges involved in facilitating audio- and/or videoconferences and ways to overcome these challenges.
- Through readings, you will identify guidelines for moderating panel discussions.

(Participant Guide 8-2)

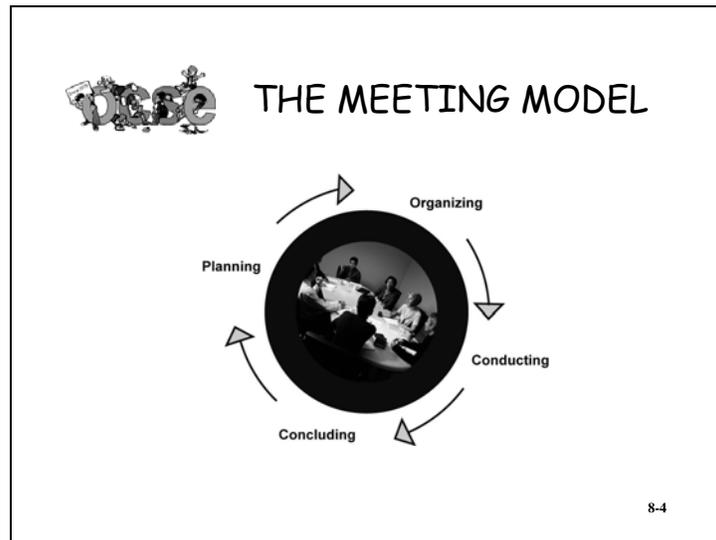
TRAINING NOTES

What you need to say/do

THE MEETING MODEL

1. Explain that a moment ago you mentioned that the module would give participants information on effective meeting principles. You will introduce them to a meeting model and then refer them to the Participant Guide for additional information.
2. Show slide 8-4, **The Meeting Model**. Review the model.
 - The first step in the model is planning the meeting. In this step, you identify the purpose of the meeting and plan the agenda.
 - The second step is organizing the meeting. This involves deciding who should attend and assigning any specific roles to attendees that will help the meeting be successful. The step also includes scheduling the date, time, and location.
 - The third step is conducting the meeting. There are some basics that you should consider such as setting ground rules, taking the minutes, and using proper meeting etiquette, as well as using any visual aids and equipment necessary to run the meeting.
 - The final step is concluding the meeting. Use the meeting as a learning tool by ending with a review of action items and a meeting evaluation.
3. State that this meeting model is an effective tool to help facilitate meetings that make good use of people's time and result in achieving the meetings' desired outcomes.
4. Refer participants to pages 8-3 through 8-22 in their Participant Guides. Explain that additional information on effective meetings is included and will be a useful reference for them.

THE MEETING MODEL



The four steps to achieving effective meetings are planning, organizing, conducting, and concluding. Each step involves specific tasks that include:

- Planning:** Identify the purpose of the meeting and plan the agenda.
- Organizing:** Decide who should attend and any special roles they should assume for the meeting to be successful. It is also important to schedule the date, time, and place with specific goals in mind.
- Conducting:** Observe meeting basics such as setting ground rules, taking the minutes, and using proper etiquette, as well as using any visual aids and equipment necessary to run the meeting.
- Concluding:** End the meeting on time. Make it a valuable learning experience by ending with a review of action items and a meeting evaluation.

(Participant Guide 8-3)

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EFFECTIVE MEETINGS

Reasons To Call a Meeting

Meetings are essential to communication within an organization. However, if not properly planned, they can also be a hindrance to a productive environment. When planning a meeting, identify why the meeting is being conducted. If the reason is, “because we always meet on Fridays at 10:00,” there may not be a need to meet that week. Some valid reasons for calling a meeting are to:

- Receive reports from a group
- Use the expertise of a group
- Involve a group in problem solving
- Involve a group in decision making
- Gain support for a problem/project
- Satisfy a group’s desire to meet
- Clarify an issue
- Reconcile conflicting views
- Communicate critical information
- Relieve tension by sharing information
- Get a quick reaction
- Energize a stalled project
- Demonstrate a product
- Facilitate staff communication
- Explore new ideas or concepts
- Share good news
- Build morale
- Coordinate activities
- Exchange information
- Report on accomplishments
- Handle special situations, e.g., train new people.

Pre-Meeting Planning Tips

In planning a meeting, ask yourself two questions:

- What will happen if you don’t call a meeting?
- Is there an alternative to calling a meeting such as e-mail, issuing a memo, or making a telephone call?

If you still need to conduct a meeting, use the outline on the next page to assist in your planning.

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(Participant Guide 8-4)

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EFFECTIVE MEETINGS, CONTINUED

Pre-Meeting Planner

| | |
|----------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Reason for meeting: | |
| My expectations: | |
| What type of meeting do I want to have? (circle one) | Information Sharing Decision Making Problem Solving Team Get Together Other _____ |
| Meeting attendees will be: | _____ _____ _____ _____ |
| Location of meeting: | |
| Date: | |
| Time: | The meeting will begin at _____ and end by _____. |
| Agenda: (circle one) | <ul style="list-style-type: none"> • will be sent out to participants by _____ • there is not enough time to send out agenda before the meeting |
| Will presentations be made at the meeting? (circle one) | Yes No If yes, what equipment will be needed? _____ |
| Can you assign roles for the meeting? | Team Leader _____ Scribe _____ Timekeeper _____ |
| Estimated cost of meeting: | Cost : _____ |
| Is this meeting a good investment? (circle one) | Yes No |

(Participant Guide 8-5)

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EFFECTIVE MEETINGS, CONTINUED

Estimating the “Real” Cost of Meetings

There are several ways to estimate the cost of meetings:

A. Using the GS pay chart, calculate the hourly salary of those attending your meetings. To do this, follow this easy, three-step method:

1. Find the annual salary for the grade and step.
2. Divide this amount by 2080.
(52 weeks/year x 40 hrs./week = 2080)
3. Multiply the result by the number of hours in the meeting.

To estimate the total cost of the meeting, perform the above calculations for all of the people attending. Don’t forget to include yourself.

B. Another method that includes overhead, benefits, etc., has been designed by the 3M Meeting Management Conference Center.

| Annual Salary | Hourly Cost of Meeting | | | | | |
|-----------------------------|------------------------|-----|-----|-----|-----|-------|
| \$62,500 | 250 | 250 | 375 | 500 | 625 | 1,250 |
| \$50,000 | 100 | 200 | 300 | 400 | 500 | 1,000 |
| \$37,500 | 75 | 150 | 225 | 300 | 375 | 750 |
| \$25,000 | 50 | 100 | 150 | 200 | 250 | 500 |
| \$12,500 | 25 | 50 | 75 | 100 | 125 | 250 |
| No. of Attendees in Meeting | 2 | 4 | 6 | 8 | 10 | 20 |

Whichever method you use, don’t forget about the “ripple effect”—that is, the hidden cost of poorly managed meetings.

Is what you are getting out of the meeting worth what you are “investing” in the meeting?

(Participant Guide 8-6)

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EFFECTIVE MEETINGS, CONTINUED

Effective Agenda

Strategies for preparing and using effective agendas appear below. As you read through the list, note that a sample agenda form follows this page. You may find it helpful when you plan your next meeting.

Strategy for preparing an agenda

- State the purpose or objective of the meeting. Include all relevant issues.
- Concentrate on major points (less is more).
- Estimate how much time each issue will take. Don't make it too tight.
- Include who's attending with their roles and responsibilities.
- Watch your phrasing; keep it upbeat.
- Focus on opportunities.
- State expectations of the meeting.
- Keep it short and simple.

Effective agendas include:

- Date of meeting
- Written objectives of meeting
- Type of meeting (e.g., problem-solving, etc.)
- Starting time
- Location of meetings (directions if necessary)
- Topics with brief description or background
- List of people attending
- Time frame for each topic
- Background sheet for special speakers
- Ending time.

(Participant Guide 8-7)

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EFFECTIVE MEETINGS, CONTINUED

Meeting Agenda Form

| | | | | | |
|-------------------------|--------------------|----------------|--|---------------------------|--|
| Date: | | Time: | | Location: | |
| Meeting Purpose: | | | | | |
| Time Frame | Agenda Item | Purpose | | Person Responsible | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
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EFFECTIVE MEETINGS, CONTINUED

Attendance Criteria

You want to ensure you have the right people at the meeting. Before inviting or scheduling people to attend, consider these criteria:

- Who can contribute to the meeting—in what way?
- Who has a working knowledge of agenda topics?
- Who has authority to make decisions?
- Who will be responsible for implementing a decision?
- Who represents groups affected by a decision?
- Who has a need to know?
- Who are key individuals who can lend support?

Scheduling

There are several things to keep in mind about the scheduling of the meeting. In order to achieve the best results, think about when the meeting will take place and if everyone who needs to be there will be available. Below are tips to help with the scheduling.

Remember:

- Avoid the worst times:
 - Monday mornings
 - Friday afternoons
 - The hour after lunch
 - The last 15 minutes before the office closes.
- Avoid surprises.
- Give people time to prepare for the meeting; provide relevant background information.
- Check the availability of key people.
- Schedule enough time during the meeting for full discussion.
- If tardiness is a problem, try scheduling at 10 or 15 minutes past the hour.
- Know your “business”—busy times, cycles, etc.
- Know your organization’s culture.

Considerations

What other special considerations do you need to take into account?

(Participant Guide 8-9)

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EFFECTIVE MEETINGS, CONTINUED

Meeting Room

Today's governmental workplace requires us to adapt to a rapid series of changes in the implementation of technology. To meet these challenges, we are using videoconferencing as a way to meet "face-to-face." PictureTel allows groups to meet and share information with several locations across the country. There are several room-related issues that influence meeting when using PictureTel. These issues are shown in the table below.

| | |
|---------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Equipment | Arrive at the meeting site at least 20-30 minutes before the meeting begins to ensure all equipment is operating properly. A contact person at each site should also arrive early so that connections can be checked before the meeting begins. |
| Size | Ensure that the room is large enough to accommodate all attendees at each location. |
| Layout (including location of specific features) | <ul style="list-style-type: none"> • Windows—Bright sunlight coming in can block attendees from being seen over PictureTel. • Doors—Close doors to eliminate distractions. • Furniture—Check to make sure the room is comfortable and the equipment is set up properly. • Electrical outlets—Ensure the equipment is plugged in at the proper location(s) and electrical cords are not stretched across a room, possibly causing a hazard. |
| Environment | <ul style="list-style-type: none"> • Lighting—Check to ensure that effective lighting is being used. For example, if a person looks washed out, try using a table lamp. • Ventilation—When spending an hour or so in a room with other attendees, check to make sure the room is comfortable. For example, some rooms have an air conditioning vent that is loud and distracting. Try to avoid such problems during your meeting. • Acoustics—Test the microphone system before the meeting to ensure the proper setting for the acoustics. For example, large rooms with high ceilings will deliver a different sound quality than smaller rooms with normal 8' ceilings. • Potential distractions—Avoid people walking in to the meeting late and phones ringing during the meeting. |

(Participant Guide 8-10)

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EFFECTIVE MEETINGS, CONTINUED

Typical Meeting Room Layouts

| Type of Layout | Advantages | Disadvantages | Meeting Purpose |
|-----------------------|-----------------------------------------------|---------------------------------------------------------------|-----------------------------------------------------------------|
| Office Setup | Everyone sits at a desk | Distractions of e-mail, phone, visitors | Quick way to share information |
| “U” Shape | Everyone sees all attendees in the room | Not meant for large groups | Allows for discussion, information sharing, and decision making |
| Semi-circle | Intimate gathering for small groups (6-12) | Not meant for large groups | Allows for discussion, information sharing, and decision making |
| Conference Table | Everyone sees all attendees in the room | If some people sit along the wall, they may not feel included | Allows for discussion, information sharing, and decision making |
| Theater | Useful for large groups such as town meetings | Group too large to participate in discussions | Receiving information |

(Participant Guide 8-11)

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EFFECTIVE MEETINGS, CONTINUED

Identifying Roles

Role of Meeting Leader

- Start on time!
- Know what is to be accomplished.
- Watch tone of voice and nonverbal cues.
- Use the agenda.
- Appeal to the interests of the group.
- Listen.
- Encourage participation.
- Use questions.
- Paraphrase.
- Keep the group on track.
- Use visual aids.
- Periodically summarize progress.

Role of Facilitator

- Provide assistance to the team leader.
- Observe the team.
- Suggest problem-solving techniques.
- Assist in gaining commitment and consensus.

Role of Timekeeper

- Keep agenda items on track.
- Prevent digressions.
- Keep the overall meeting focused.

Role of Scribe

- Record meeting minutes in full view of the group.
- Capture key ideas.
- Don't edit. Use their words.
- Write fast—legibly.
- Abbreviate.
- Don't worry about spelling.
- Use outline form.
- Use colors.
- Remember it's okay to lag behind—a bit.
- Use symbols.
- Transcribe your notes into project format.
- Record any future agenda.

Time is what we want most, but what alas! We use worst.

—William Penn

(Participant Guide 8-12)

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EFFECTIVE MEETINGS, CONTINUED

Ground Rules

Ground rules are the accepted behaviors/norms for the meeting group. It is best for the whole group to create the ground rules. After creating the ground rules, it is up to each attendee to enforce them. This is not a responsibility left solely up to the meeting leader. Some of the most common ground rules are:

- Respect each other's opinions
- One person speaks at a time
- Be on time
- Avoid personal attacks
- Avoid side conversations
- Observe confidentiality/non-attribution.

It is important to note that ground rules are not set in stone. The guidelines should be revisited periodically to ensure that everyone agrees to follow them. It may be necessary to add or delete a ground rule at the meeting group's discretion.

Meeting Minutes

Minutes are not taken at all meetings. However, it is imperative that minutes be taken when you need to have a formal record for documentation purposes (i.e., legal issues). Minutes are also helpful in keeping track of accountability during a meeting, assisting in developing the next meeting agenda, and following up on topics of discussion. When minutes are taken, they should include the following:

- Who called the meeting/meeting leader
- Date, time, and place
- List of people attending
- Key issues or topics addressed
- Agreements, commitments, decisions made
- Conclusions
- Action items.

(Participant Guide 8-13)

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EFFECTIVE MEETINGS, CONTINUED

Meeting Minutes Form

| | | |
|-------------------------------------------------|---------------------------|------------------|
| Date/Time of Meeting: | | Location: |
| People Who Attended: | | |
| | | |
| | | |
| | | |
| Key Issues – Action Items: | | |
| Action Item | Person Responsible | Due Date |
| | | |
| | | |
| | | |
| Agreements, Commitments, Decisions Made: | | |
| | | |
| General Meeting Comments: | | |
| | | |

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EFFECTIVE MEETINGS, CONTINUED

Sound Communication

One of the components that makes videoconferencing work is based on sound—the telephone. But to be most effective, the sound has to be heard. The sound should be so transparent so that it is taken for granted. This results from attention to two factors: placement and sound level.

Imagine that microphones are stones and the sound travels out like ripples across a pond. PictureTel microphones make that metaphor easy to understand since they look like perfect skipping stones. But these elegant spheres house a system of sound management that rewards good placement with outstanding response. Place them so that they can cover an area about the size of a 20-foot circle. If the room being used is not square, some overlap may be needed to keep sound levels appropriate. But once they have been set, the microphones do not need any assistance. They automatically adjust their volume so that anyone who speaks can be heard.

This does not mean that there is no concern about sound levels. Experience has shown that keeping sound level high allows the best interaction. Some people are unwilling to speak up, while others drown out the microphone. Let participants know that speaking comfortably is all that is required and that you might have to ask occasionally for repetition because of distance from the microphone. Take time to adjust the level on the PictureTel equipment to match a comfortable listening level; you may find it needs to be higher than you might normally set it.

(Participant Guide 8-15)

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EFFECTIVE MEETINGS, CONTINUED

Using Visual Aids

Visual aids can enhance a presentation and make the information clear, concise, and visually stimulating. In fact, according to Industrial Audio Visual Association, we remember 50 percent of what we see and hear and only 20 percent of what we hear (without using visual aids). Below is a list of the four most popular visual aids used in the workplace. There are advantages and disadvantages to each, so choose the most appropriate for your meeting. Please note that, if you are using PictureTel, overheads or flipcharts will not be your first choice.

| Type of Visual Aid | Advantages | Disadvantages |
|--------------------|------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|
| PowerPoint | Easy to use color and templates to enhance information. * Everyone can see it at their location. Easy to make changes. | May not be familiar with PowerPoint program. If equipment is unavailable, slides cannot be used. |
| Handouts | Everyone has a copy and can use it for notes. Handout should outline presentation. | May be too detailed so audience reads ahead and does not listen to presenter. Difficult to keep neat. |
| Overheads | Easy to make changes. Easy to prepare. | When using PictureTel, the bright light may wash out overheads at remote site locations. |
| Flipcharts | Easy to use. Works well for small groups. | When using PictureTel, participants at remote site locations may not be able to see very well. |

* A study performed by 3M indicates that using color in visuals increases comprehension, retention, persuasion, and the willingness of audiences to commit resources to the speaker's ideas.

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EFFECTIVE MEETINGS, CONTINUED

Meeting Etiquette

There is etiquette that everyone should follow when conducting or attending a meeting. These points may seem basic, but they are worth mentioning, especially when using PictureTel.

- Check equipment to make certain all is in working order. Time will be wasted with equipment glitches that could have been corrected before the meeting started.
- Maintain eye contact with people on the screen. Remember that your audience is wider than the room you are sitting in. Watch facial expressions and respond to them.
- Use expressive gestures, but don't exaggerate or overuse them.
- Vary your tone of voice, enunciate words, and pace your rate of speech.
- Have participants identify themselves by name and location when they speak. This will allow the voice-activated camera to turn on them so other sites will see who is speaking.
- Do not place feet on conference table.
- Do not hold side conversations with others in the room. This is very distracting to the other attendees at all sites participating in the meeting.
- Arrive on time and avoid leaving early. This is distracting to meeting attendees.
- Avoid eating, unless the meeting is a "working lunch." With sensitive microphones, the crunching can be distracting.
- Come to the meeting prepared. Avoid holding the meeting up while you find notes or other reference material.

(Participant Guide 8-17)

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EFFECTIVE MEETINGS, CONTINUED

Meeting Evaluation

Evaluating the meeting can be one of the most important tasks. The most common type of evaluation is the plus (+) and minus (-) method. The pluses represent everything that was good at the meeting and the minuses are areas that could use improvement.

Most often a critique of the meeting is done at the end; however, this can be difficult because people are tired and ready to go. If you find it too hard at the end of the meeting, an alternative can be to conduct an evaluation at a midpoint during the meeting. This would allow a review and possibly correction of areas to improve on. Two sample evaluations follow.

Sample #1

| + | - |
|---------------------------------------|-----------------------------------------|
| Followed agenda. Good visual aids. | Needed a break. Did not end on time. |

Sample #1 is the most popular because it is also the quickest.

Sample #2

Our meeting today was:

| | | | | | | |
|----------------|---|---|---|---|---|---------------|
| Wonderful | 1 | 2 | 3 | 4 | 5 | Disappointing |
| Focused | 1 | 2 | 3 | 4 | 5 | Rambling |
| Energetic | 1 | 2 | 3 | 4 | 5 | Sluggish |
| Worth the Time | 1 | 2 | 3 | 4 | 5 | Waste of Time |

Sample #2 can be as detailed as you like and include whatever meeting characteristics you would like to have feedback on from the meeting.

(Participant Guide 8-18)

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EFFECTIVE MEETINGS, CONTINUED

Ending the Meeting

It is important attendees feel satisfied that their time was well spent. There are several steps necessary to ending the meeting.

Closing Steps

- Review the agenda.
- Reiterate action items and who is responsible.
- Set the date for the next meeting.
- End on a positive note.
- Stand and leave.

The Golden Rule of Meetings: End on Time!

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EFFECTIVE MEETINGS, CONTINUED

Checklist for Managing Effective Meetings

Use this checklist to help you plan and conduct your next meeting.

| | |
|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Before | <ul style="list-style-type: none"> • Evaluate alternatives before calling the meeting. • Identify the specific reason for calling a meeting. • Invite people based on their ability to contribute or need to gain information from the meeting. • Prepare an agenda. • Distribute the agenda in advance of the meeting. • Send meeting notification. • Arrange for appropriate room size and layout. |
| During | <ul style="list-style-type: none"> • Start the meeting on time. • Keep to the agenda to stay on track. • Facilitate group participation in accomplishing meeting goals. • Listen to keep communication flow open and balanced. • Help the group focus on content and process. • Use visual aids. • Conduct a meeting evaluation. • End the meeting on time. |
| After | <ul style="list-style-type: none"> • Distribute meeting minutes within 48 hours. • Arrange for follow-up action. • Estimate cost vs. benefits of the meeting. |

(Participant Guide 8-20)

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EFFECTIVE MEETINGS, CONTINUED

References

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Meetings : Do's, Don'ts and Donuts: The Complete Handbook for Successful Meetings; Sharon M. Lippincott; ©1999; Lighthouse Point Press; ISBN: 0963796666

How to Hold Successful Meetings : 30 Action Tips for Managing Effective Meetings (30-Minute Solutions Series); Paul R. Timm; ©1997; Career Press; ISBN: 1564143252

Running a Meeting That Works (Business Success Series); Robert F. Miller and Marilyn Pincus; ©1997; Barrons Educational Series; ISBN: 0812098234

First Aid for Meetings : Quick Fixes and Major Repairs for Running Effective Meetings; Charlie Hawkins; ©1997; Bookpartners Inc.; ISBN: 1885221614

We've Got to Start Meeting Like This : A Guide to Successful Meeting Management; Roger K. Mosvick and Robert B. Nelson; ©1996; Jist Works; ISBN: 1571120696

Better Business Meetings (Briefcase Book Series); Robert B. Nelson and Peter J. Economy; ©1994; Irwin Professional Pub.; ISBN: 0786301880

How to Make Meetings Work, Michael Doyle and David Straus; ©1993; Berkley Pub. Group; ISBN: 0515090484

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EFFECTIVE MEETINGS CHECKLIST

Use this checklist to help you manage and facilitate effective meetings. Check column A if you do this task well. Check column B if you do not do this and need to begin.

| A | B | |
|-----|-----|------------------------------------------------------------------------------------------|
| ___ | ___ | Consciously evaluate alternatives before calling a meeting |
| ___ | ___ | Hold meetings only for specific reasons |
| ___ | ___ | Invite people to attend based on their ability to contribute or need to gain information |
| ___ | ___ | Prepare an agenda |
| ___ | ___ | Distribute the agenda in advance of the meeting |
| ___ | ___ | Send meeting notification |
| ___ | ___ | Consider the room size and layout of furniture |
| ___ | ___ | Start the meeting on time |
| ___ | ___ | Make an opening statement |
| ___ | ___ | Stick to the agenda |
| ___ | ___ | Lead the group in accomplishing meeting goals |
| ___ | ___ | Keep communication flow open and balanced |
| ___ | ___ | Help group focus on content and process of meeting |
| ___ | ___ | Create a "meeting memory chart" during the meeting |
| ___ | ___ | Use visual aids |
| ___ | ___ | Summarize periodically throughout the meeting |
| ___ | ___ | End the meeting on time |
| ___ | ___ | Distribute copies of the meeting minutes to the attendees |
| ___ | ___ | Arrange for follow-up action |
| ___ | ___ | Evaluate your meeting management effectiveness |
| ___ | ___ | Estimate the cost vs. benefits of the meeting |

(Participant Guide 8-22)

TRAINING NOTES

What you need to say/do

TECHNOLOGY-ENHANCED MEETINGS

1. State that many facilitators are increasingly facilitating meetings with people and groups who are connected over distance through technology. The most common technologies used are audioconferencing and videoconferencing.
2. Show slide 8-5, **Common Meeting Technologies**.
3. State that an audioconference differs from a telephone conversation in that it involves more than two people in at least two locations. It operates on the same principle as a “conference call” in that it connects people via telephone lines joined in a single circuit.
4. Explain that videoconferences link video images of people in different locations via modems and telephone lines so that they can see one another while communicating.
5. State that the basic principles of effective meeting management apply to these “technology-enhanced” meetings.
6. Point out that if the main purpose of facilitation is to make groups work more effectively, then the main purpose of facilitating with technology is to make groups work even more effectively than they could without it. However, in truth, it doesn’t always turn out as nicely as we would like.
7. Ask for a show of hands of those who have facilitated and/or participated in a meeting that used audio- and/or videoconferencing as a way to communicate.

TECHNOLOGY-ENHANCED MEETINGS



Audioconferencing. The audioconference is one form of technology that most people are already familiar with. An audioconference links people and groups via a telephone line that is equipped to handle multiple callers.

Videoconferencing. The videoconference, in its simplest form, links people and groups across a distance by sending an audiovisual picture from the main group to one or more remote sites. Each remote site has a monitor-like device that receives the signal. Two-way communication takes place through a teleconference or computer line.

(Participant Guide 8-23)

TRAINING NOTES

What you need to say/do

TECHNOLOGY-ENHANCED MEETINGS, CONTINUED

8. Ask the participants if they would agree that facilitating and/or participating in these meetings can be particularly challenging.

(Note: Participants will typically agree that it is indeed challenging.)

9. Tell the participants that in order to understand how challenging these meetings can be, you'd like for some of them to demonstrate what can go wrong.

EXERCISE: CHALLENGES OF TECHNOLOGY-ENHANCED MEETINGS

1. Ask five to six participants who indicated they've facilitated and/or participated in an audio- or videoconference to help you demonstrate.
2. Explain they will create a 5-minute skit that depicts the things that can, and often do, go wrong.
3. Tell the other participants that their task is to observe the skit and be prepared to share the challenges/problems they observed during the skit.
4. Ask the group who will perform the skit to join you outside the classroom so you can give them some guidelines.
5. Tell them to take the next 15 minutes to create a skit that depicts an audioconference meeting. One person will facilitate and the others will be meeting participants.
6. Explain that they should agree on the meeting topic and purpose.

What you need to know

1. The exercise on the challenges of technology-enhanced meetings takes approximately 40 minutes. Allow 15 minutes for the enactors to prepare their skit, 5 minutes for the skit itself, and 15 to 20 minutes for debriefing.

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TRAINING NOTES

What you need to say/do

EXERCISE: CHALLENGES OF TECHNOLOGY-ENHANCED MEETINGS, CONTINUED

7. Distribute Handout 8-1: Challenges of the Audioconference Meeting to enactors only. Tell them to be sure the group demonstrates these behaviors during their meeting.
8. Answer any questions.
9. After 15 minutes, have the group perform their “skit.” Then thank the group and lead a round of applause for them.
10. Debrief the exercise by asking the other participants the following questions:

“What problems did you observe?”

“What behaviors did you see?”

Write their responses on a flipchart. Make sure the responses include the behaviors and/or problems listed on Handout 8-1. Use their list to cover the information on ground rules for audio- and videoconferences and participant tips on pages 8-24 through 8-26 in their Participant Guides.

11. Ask the participants what problems are specifically related to facilitating or participating in videoconference meetings. Be sure responses include:
 - Looking into monitor before speaking
 - Touching the microphone
 - Making sudden gestures
 - Microphones amplifying noises such as people shuffling papers and making other distracting noises
 - Wearing intense or “hot” colors of clothing
 - Wearing narrow stripes, prominent herringbone patterns, small checks, or other intricate designs
 - Difficulty in tracking participation
 - Delay while camera finds and focuses on a speaker.
12. Tell the participants that pages 8-24 through 8-26 in the Participant Guides contain common ground rules for audio- and videoconference meetings as well as tips that they can send to meeting participants before a meeting. Many of these are ones we have already discussed.

COMMON GROUND RULES FOR AUDIO- AND VIDEOCONFERENCE MEETINGS

Audioconferences

- Always identify yourself.
- Speak in the order of your name on the participant list, unless otherwise indicated. You can pass if you have no comment.
- Wait for the previous person to finish before speaking; otherwise, comments will be muddled or cut off on speakerphones.
- Interrupt only if you don't understand and need clarification.
- Stay on the call from start to finish. If you cannot stay on the call, let people know at the start of the call.
- Avoid interruptions. Have someone else handle business while you're on the call.

Videoconferences

- Always pause before speaking.
- Keep comments brief. (Optional: There will be a ____ minute limit.)
- Before speaking, announce from which site you are speaking and state your name.
- Speak in a normal tone and at a normal volume.
- Look into the monitor while speaking.
- Refrain from side conversations.
- Don't touch your microphone. Let the technical person make any adjustments.
- Move a little more slowly than you normally would. Avoid moving around or fidgeting.
- Refrain from shuffling papers or making other distracting noises. Microphones amplify sounds.
- Avoid making sudden gestures, which can make the video image choppy.

(Participant Guide 8-24)

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PARTICIPANT TIPS FOR TECHNOLOGY-ENHANCED MEETINGS

- When using a speakerphone, wait until there is a slight pause before speaking to avoid cutting off the last speaker before he or she is finished.
- Arrange for someone else to handle your work while on the call. Don't allow interruptions.
- Stay on the line for the whole conference. If you must leave before the scheduled end, announce your intention at the beginning of the meeting. Accept decisions made by others in your absence.
- Always state your name before speaking. Also state the name of the person to whom you are addressing your comments.
- Take notes. Jotting down notes holds your attention and helps you to remember who says what.
- Keep notes about points you want to make. Don't offer your thoughts immediately. Wait until it's your turn or until you have several things to say.
- Speak in turn according to your place on the list for the meeting.
- Acquire a shoulder rest for your phone if you're not using a speakerphone. Lightweight headsets are also helpful if you do a lot of audioconferencing.
- Hold the receiver away from your mouth. Breathing noises may cause interference on the phone lines.
- Speak at slightly slower than normal speed and enunciate clearly.
- Be especially conscious of your tone and vocal inflections. Research indicates that people interpret vocal cues more accurately than facial expressions or body language.
- Be on time for the call.
- View the calls as opportunities to sharpen your listening skills.
- Be conscious of your "air time." Don't dominate the call.
- Review any related materials before the meeting so you can stay with the group during the conference.

(Participant Guide 8-25)

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PARTICIPANT TIPS FOR TECHNOLOGY-ENHANCED MEETINGS, CONTINUED

- Get your beverage, go to the restroom, and so on, before the call.
- If people are sharing a speakerphone, everyone should move close to the microphone so they can be heard. Better speakerphones can pick up a range of 12 to 15 feet. Most are only effective in much shorter ranges.
- For videoconferences, avoid very intense or “hot” colors such as deep reds because they can be overwhelming on the screen. Light pastels look better than a bright white that will make you appear to glow. Try to balance light and dark clothes so that the camera’s exposure control gets an even reading of light.
- For videoconferences, avoid narrow stripes, prominent herringbone weaves, small checks, and other intricate designs. These can cause distracting visual effects on camera.

(Participant Guide 8-26)

TRAINING NOTES

What you need to say/do

FACILITATING WITH TECHNOLOGY

1. Show slide 8-6, **Facilitating with Technology**. State that many of the challenges of facilitating with technology can be overcome by following these five steps. Explain that each step is covered in detail in their Participant Guides on pages 8-28 through 8-31.

FACILITATING WITH TECHNOLOGY



FACILITATING WITH TECHNOLOGY

- Determine the need
- Select the right technology for the right purpose
- Complete meeting pre-work
- Ensure successful meeting
- Complete follow-up tasks

8-6

(Participant Guide 8-27)

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FACILITATING WITH TECHNOLOGY, CONTINUED

STEP 1: DETERMINE THE NEED

The first step is to assess whether or not the use of technology can add value to the group's work. For example, you might want to use technology to bring groups from different locations together to work simultaneously while avoiding the cost of travel. However, remember that newly formed groups, particularly those tasked with difficult or complex assignments and who must come to consensus by exploring divergent perspectives, need a chance to get acquainted and build the intimacy and trust necessary to progress through the stages of group development.

STEP 2: SELECT THE RIGHT TECHNOLOGY FOR THE RIGHT PURPOSE

Begin by asking yourself three questions:

- √ What is the group trying to accomplish?
- √ How simple or complex is the group's task?
- √ How cohesive is the group?

The simpler the group's task and the more unified or cohesive the group, the more likely they are to benefit from using technology. Videoconferencing is primarily used for groups that are relatively unified with clearly defined, relatively simple problems to solve whose members are working from different locations. Audioconferencing works best with groups that need a minimum of face-to-face contact to successfully complete the task. Both audio- and videoconferencing are best used for sequential information processes such as people talking in turn, people commenting in response to a cued question, or a panel talking in a question and answer format.

(Participant Guide 8-28)

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FACILITATING WITH TECHNOLOGY, CONTINUED

STEP 3: COMPLETE MEETING PRE-WORK

The third step in facilitating with technology is doing the meeting pre-work. This involves first finding out if people have used the technology before and what the experience was like for them. People typically are more familiar with audioconferences than they are with videoconferences. But, if they had a bad experience, what went wrong?

You will also want to fit the technology to the group's capabilities by evaluating how the technology could interfere with people who have various challenges such as problems with eyesight, hearing, culture and language differences, and so on.

Your pre-work checklist should also include setting up and testing the technology. Make sure you not only have backup technology wherever possible but also can use a low-tech approach if all systems fail.

You will want to coordinate roles and responsibilities with the person who will operate the technology. This is particularly true with videoconferences. Discuss ahead of time what you will do in various situations, how to deal with the inevitable lag times, and when you will schedule breaks. If you are working by yourself, be sure you can facilitate a group and run the technology at the same time. Adding technology makes facilitating a group much more complex.

(Participant Guide 8-29)

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FACILITATING WITH TECHNOLOGY, CONTINUED

STEP 4: TAKE MEASURES TO ENSURE A SUCCESSFUL MEETING

The fourth step is comprised of the most important guidelines that ensure the meeting will be successful.

Begin the meeting by welcoming the participants and/or remote sites and “call the roll” asking each person to respond. As in the face-to-face meeting, you can use the introductions as an icebreaker by asking that each person add some type of information to his or her introduction.

At least 1 day before the meeting, fax agendas to everyone involved. Included with the agenda should be the purpose of the meeting and the method people should use to connect to the conference and any call-in numbers (for audioconferences) needed to connect or re-connect should they get cut off. Send out any materials that participants should review for the conference well ahead of time.

Ask people to identify themselves before speaking and to state to whom they are directing their comments, if not the entire group. This is particularly important in audioconferences.

Remind participants of the ground rules. You can send out the suggested ground rules and additional tips on pages 8-24 through 8-26 to participants in advance if you choose.

“Round-robin” speaking should be used for all audioconferences. Call on each person in turn and ask for comments. Use the participant list and call on people in the same order each time there is a discussion.

In videoconferences, even if there’s great audio and video signal, remote-site participants will not be able to pick up all the nonverbal cues that the main group will. Frequently summarize the state of the main group’s thinking and feeling. Check with the remote groups to see if they’re tracking the discussion.

Consider designating someone to be a remote-site(s) co-facilitator(s). This person can be your “eyes and ears” at the site so that you are aware of what’s happening with the group. This is particularly helpful when you are facilitating very large groups.

Appropriate closure is particularly important when you are facilitating several remote-site groups. Before ending the meeting, check out your summary with each site and invite them to clarify its contents. Give each person—or in the case of videoconferences each site—the opportunity to say good-bye and sign off. Let everyone know how and when the meeting record will be distributed.

(Participant Guide 8-30)

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FACILITATING WITH TECHNOLOGY, CONTINUED

STEP 5: COMPLETE FOLLOW-UP TASKS

The final step when facilitating with technology is to complete the follow-up tasks. It's always helpful to do a debriefing after each meeting even when technology is not involved. It's a must when facilitating groups using technology. Identify the lessons learned, changes for next time, etc., to learn how to improve technology's role in future meetings.

Connect the entire group in a final report. It's important to send at least an executive summary of the major conclusions along with action items and accountability.

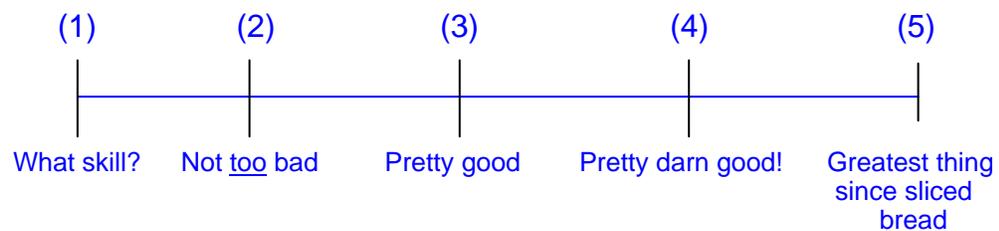
(Participant Guide 8-31)

TRAINING NOTES

What you need to say/do

MODERATING PANEL DISCUSSIONS

1. Explain that the final topic in this module is moderating panel discussions.
2. State that this is yet another situation where participants can apply their facilitation skills.
3. Refer participants to the prepared flipchart illustrated below:



4. Have each participant rate him- or herself on his or her current level of skill in moderating panel discussions. Tell participants to use the 1 to 5 rating scale.
5. Place an X on the portion of the continuum that relates to each participant's skill level. Then summarize the results.
6. Ask the participants what things they have seen effective moderators do or say or what things they have done or said as moderators that helped a panel discussion to be successful.
7. Write the word, TIPS, at the top of the flipchart paper. Write their responses.
8. State that there are guidelines they might find helpful when moderating panels and handling question and answer sessions.
9. Refer them to page 8-32 in their Participant Guides and review the guidelines. Then ask if they have any questions about moderating panel discussions and/or anything they would like to add.

What you need to know

1. The activity in which participants rate their skill at moderating panel discussions is designed to be humorous and light-hearted. Make sure you read the text related to the numerical ratings on the scale. Move quickly through the activity.

GUIDELINES FOR MODERATING PANEL DISCUSSIONS AND QUESTION AND ANSWER SESSIONS

Introduce the panel with TIP (Topic, Interest, People)

Start with the topic and what's important about it. Relate why it should be of interest to the audience and your own interest as moderator. Then introduce individual panel members in a way that establishes their credibility to speak on the topic.

Agree to a format in advance

Make sure that you and everyone on the panel are aware of the time constraints. Make agreements in advance about the use of the time, then, as the moderator, keep it moving.

There are many formats to choose from. A popular one is to give panel members a certain number of minutes (for example, 5 minutes) to introduce their overview perspectives about the topic. You will then pose prepared questions to the specific panel members most suited to address the questions. It is recommended that you get at least two panelists' views on each question. Some moderators then open the floor to questions from the audience. If you do this, be sure to ask questioners to specify if their questions are for specific members. If not, then you may manage participation by asking specific panel members to respond to specific questions.

Conduct an appropriate wrap-up

With at least 5 minutes to go, stop the Q&A for a wrap-up. Don't say, "Well, we're out of time." Do say, "What I heard today is ..." and summarize from your notes. Thank each of the panelists by name and thank the audience for participating.

TRAINING NOTES

What you need to say/do

MODULE 8 KEY POINTS

1. Show slide 8-7, **Module 8 Key Points**. Review the key points.
 - The Meeting Model will help you to plan, organize, conduct, and conclude effective meetings.
 - There are specific challenges when facilitating groups with technology. Successful facilitators are aware of these challenges and take the steps needed to overcome them.
 - There are guidelines that can help you to moderate panel discussions and lead Q&A sessions.

EXERCISE: REFLECTION

1. Refer participants to page 8-34 in their Participant Guides. Ask them to spend the next 5 to 7 minutes reflecting on what they have learned and using that information to complete the questions.
2. Have a few volunteers share one thing they will stop, start, or continue to do when facilitating groups using technology.
3. Close the module and transition to Module 9, Summary and Close of Workshop.

What you need to say/do

1. The Reflection exercise takes approximately 10 minutes. This includes time for participants to share their responses.
2. Make Post-It notes available for marking pages.

MODULE 8 KEY POINTS



MODULE 8 KEY POINTS

- The Meeting Model will help you to plan, organize, conduct, and conclude effective meetings
- Effective facilitators recognize the special challenges of using technology and take steps to overcome them
- Guidelines can help you to moderate panel discussions and lead Q&A sessions

8-7

(Participant Guide 8-33)

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