



Effective Meetings

By Health Nexus

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Healthy people, thriving communities
Des gens en santé, des communautés florissantes

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Introduction

In our work in partnerships, we often need to share information, exchange ideas, discuss strategies, or make collective decisions. To do this, we organize meetings. Sometimes, we have so many meetings that we can't get our work done. Other times, inefficient meetings keep us from meeting our objectives.

How can we conduct meetings that are useful, efficient, and inclusive?

This resource offers advice on the necessary components of effective meetings. Most of the advice in this resource can be applied to virtual as well as in-person meetings.

Three steps for effective meetings¹

Conducting an effective meeting involves three key steps or requirements:

- Preparation (before)
- Facilitation (during)
- Follow-up (after)

1. Preparing the meeting

Effective meetings require preparation and planning. This work involves the following:

Identify who should attend.

Use a lens of inclusion,² while considering demands on partners' time resources, to identify who to invite to a meeting. Who would add valuable diversity to discussions? Who doesn't need to attend, but should be sent the minutes and otherwise kept informed?

Clarify goals and objectives.

Effective meetings have a clear purpose with objectives that are well-defined and understood by all participants. Whenever possible, consult with partners to clarify the main objectives of each meeting (for example, at the end of the previous meeting).

Prepare the agenda.

Structure the meeting with an agenda that achieves your objectives and offers real opportunities for everyone to engage. Identify the main agenda activities and allot time for each. Refer to the box on this page for a list of essential agenda items.

Meeting agendas should include:

- Title, location, date and time of the meeting
- Welcome and introductions
- Review of the purpose and objectives for the meeting
- Review of the meeting guidelines
- Review and approval of the agenda
- Review of the minutes from the last meeting
- List of agenda items, with allotted time for each
- Wrap up and next steps, including date and agenda items for the next meeting
- Evaluation of the meeting

Distribute the meeting invitation and agenda.

Send a clear and simple invitation, along with supporting materials, to all participants as soon as the meeting date is confirmed. Aim for no later than one week before the meeting. Improve turnout by providing a reminder the day before the meeting by email, phone, or calendar update.

Arrange meeting logistics.

Arrange for audiovisual requirements, room set up, refreshments, printed materials, and facilitation materials (markers, post-it notes, flipchart paper, tape, etc.). Identify and arrange for specific accommodations so that all meeting attendees can participate actively, such as remote participation options, physical access considerations, hearing or visual considerations, languages spoken, childcare, and so on. Test any essential technology to ensure participants are able to use it, and make backup plans in case technology fails.

2. Facilitating the meeting

Facilitation is the art of guiding groups of people through processes to help them reach agreed-upon goals in a way that encourages participation, ownership and creativity from all involved, while fostering respect and trust.³

Facilitation begins before the meeting officially starts. The atmosphere should be relaxed and informal to foster trust and interaction. Give some extra attention to participants who do not know other members, to help them feel welcomed and comfortable. When you officially start the meeting, create a climate of warmth and openness to encourage everyone's active participation.

There are three key elements of facilitation.⁴ Each of them contribute to the smooth running of a meeting: centering, listening and assertiveness.

At different stages of the meeting, support "centering" among the participants.

Animate icebreakers to build connection. Review the objectives, agenda and guidelines (principles for working together) to focus members on the collective work ahead. During the meeting, observe

the group's verbal and non-verbal dynamics. When needed, suggest a break to relax the dynamics or to refresh participants' energy. You can support connection at the end of a meeting by inviting each person to share "something I appreciate ..." about the person sitting to their left (i.e. passing around the table, each person speaks once).

Throughout the meeting, listen to participants.

Listen to how participants express themselves on the various topics of the meeting. Clarify, summarize and reframe exchanges in order to support mutual understanding, and to guide group dialogue towards the meeting objectives. Given the fact that the number of people in a group influences levels of participation (see box on the next page), consider when breaking into small group (or pair) discussions can support more members being heard. When you do this, post-it notes (instead of a flip chart) can facilitate quicker presentation of key points back to the large group. For practical descriptions of diverse participatory sharing, listening and dialogue techniques, see *Additional Resources* on page 6 at the end of this document.

Throughout the meeting, use the pronoun "I" to communicate assertively.

Assertive behaviour involves stating one's feelings, wants and needs while taking into consideration those of others.⁵ In an ideal situation, assertiveness is practiced by everyone in the meeting. Here are some examples of what you might say: "I feel that there is more to this subject..."; "I wonder if..."; "I notice that this topic is important to you..."; "I realize we're going overtime..." To communicate assertively, you should also confirm with others whether you have correctly understood a statement or situation.

Where possible, meeting facilitators are assisted by one or two people:

- a note taker
- a timekeeper

In certain circumstances -- for example, dealing with sensitive, specialized or complex issues -- it may be better to use an external facilitator to conduct a meeting.⁶

The number of people at meetings influences participation

- 3-6 people: Everyone speaks.
- 7-10 people: Almost everyone speaks. Quieter people say less. One or two may not speak at all.
- 11-18 people: 5 or 6 people speak a lot, 3 or 4 others join in occasionally.
- 19-30 people: 3 or 4 people dominate.
- 30+ people: Little participation possible.

Source: Jenny Rogers (1989) quoted in Pretty et. al., 1995.⁷



3. Following up after the meeting

Evaluation: A short reflection at the end of each meeting should be part of the group's culture. For examples of simple and engaging questions and techniques, see *The Power of Reflection: An introduction to participatory evaluation techniques*.⁸

Meeting Minutes: Send out minutes for each meeting within 24 hours.⁹ Action items should be clearly defined, clearly assigned, and well understood. See the box on this page for a list of items in a complete meeting report.

Updates: To encourage teamwork, it is preferable that follow-up tasks be divided among group members. Track progress by sending an email at a fixed time after the meeting (1-2 weeks) encouraging updates. If the note taker records all actions planned and person(s) responsible in one place on the minutes, it will be enough to copy this list and circulate it.

Meeting minutes should include:

- Date, time and location of the meeting
- List of those who attended and those who sent regrets
- The goal and objectives for the meeting
- Any actions taken since the previous meeting
- Discussion and decisions
- Actions planned, indicating dates and person(s) responsible
- Date, time and location of the next meeting

Parting Words

An effective and productive meeting provides participants with the information they need to move forward. It rekindles members' commitment and motivation around common goals. Participants feel that progress is being made together and that meetings are a good use of their time.

Adequate preparation, supportive facilitation and rigorous follow-up are your key ingredients for success.

Additional Resources

[Facilitating Meetings](#) Seeds for Change, 2009

[Creating the Change We Want: A Guide for Building Neighbourhood Capacity](#) Community Development Framework, 2016

[Facilitation for Healthy Communities Toolkit](#) HC Link, 2017

[Participatory Evaluation Toolkit](#) Health Nexus, 2018

References

¹ Institut Atlantique d'Aménagement du Territoire, Poitou-Charentes. *Guide méthodologique du travail en commun : Animer une réunion.* 2005.

² Collaborative Leadership in Practice. *Equity Analysis of Group Membership: A template for Collaborative Leadership in Practice.* Toronto, ON: Health Nexus and Ontario Public Health Association, 2016.

³ David Sibbet. *Principles of Facilitation: The Purpose and Potential of Leading Group Process.* The Grove Consultants International, 2002.

⁴ Ontario Self-Help Network. *Three Elements for New Facilitators.* Toronto, ON: Self-Help Resource Centre, 2007.

⁵ Ontario Self-Help Network. *Three Elements for New Facilitators.* p7.

⁶ As part of its partnership support services, Health Nexus consultants can design and facilitate collaborative reflection and planning sessions for your partnership meetings or community consultations.

⁷ J.N. Pretty, I. Guijt, J. Thompson, I. Scoones, *A Trainer's Guide for Participatory Learning and Action.* London: IIED, 1995. p44.

⁸ Health Nexus. *The Power of Reflection: An introduction to participatory evaluation techniques.* Toronto, ON: Health Nexus, 2018.

⁹ Association paritaire pour la santé et la sécurité du travail. *Santé psychologique : Quelques clés pour avoir des réunions efficaces.* Québec, QC: APSSAP, 2013.

Health Nexus adapted and republished this resource to support organizations working on Political Action and Community Action projects with funding from Status of Women Canada (SWC). We hope this will be a practical resource as you create systemic change supporting women's empowerment and leadership. SWC-funded projects are invited to contact Health Nexus with any questions, or for partnership support coaching/facilitation on related themes at collaboration@healthnexus.ca.

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Download this resource at:

<http://en.healthnexus.ca/sites/en.healthnexus.ca/files/resources/effectivemeetings.pdf>

Cette ressource est aussi disponible [en français](#).



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