

# MANAGING IN-PERSON AND VIRTUAL MEETINGS

## ***Managing In-person Meetings<sup>i</sup>***

### **Effective Meeting Facilitation.**

Facilitation is the key to obtain desired results and have satisfied board members. Effective meetings start with reviewing the agenda, goals and anticipated outcomes, and wisely use the information provided or the work done prior to the meeting (which also reinforces members meeting preparation). Effective meetings also make the best use of time, starting and ending on time. Outstanding facilitation should promote positive interaction among board members and maintain interest and involvement throughout the meeting. Effective meeting facilitation reduces time-wasting activities, such as people holding competing conversations or frequent off-topics discussions. Effective facilitators should be attentive to board members' needs and sensitivity on specific issues; when boards are cross-cultural particular sensitivity will be necessary. Physical environment (and food) should not be disregarded as positive elements for effective board meetings.

### **Debrief the Meeting Process.**

Evaluating the overall meeting on a regular basis (5-10 minutes at the end, maybe simply as a round-table approach) can contribute to the overall effectiveness of the board's work and make meetings even more effective in creating organization results.

Meetings' assessments can highlight areas for improvement, as well as commend the board for its strengths. It can also be beneficial to have the meeting's discussions evaluated by a neutral observer. When boards have to hold long meetings the chair or the person facilitating it might want to consider having a 5-minute "satisfaction check" every couple hours, allowing participants' feedback to be incorporated right away. Evaluations can include valuable and non-valuable components of the meeting, relevancy of the topics discussed, participation levels, time management, etc. When evaluations are written, secretaries' should summarize board members' feedback and made them available for discussion at the following meeting.



For a simple guide on collecting board meeting feedback go to [Tools](#)

### **Effective Meeting Follow-up.**

Board members will more likely contribute to the agreed upon outcomes of a meeting when they start acting right away. Having the minutes as soon as possible is a great way to promote immediate action. Ideally the minutes and related documents should be distributed within one business day. But for the best results, follow-up plans should be made during the meetings, including specific action items, corresponding board member responsible for the action item, specifications of what the completion of the action implies, and a reasonable deadline. Effectiveness in the achievement of those results can be enhanced by a follow-up plan in between meetings but it will mostly be boosted through a culture of accountability for results enacted at every meeting.

## ***Managing Virtual Meetings***

In virtual meetings most of the healthy guidelines for ordinary meetings apply: prepare in advance, start and end on time, define objectives, etc. And the same careful preparations must be carried out, even more so if complicated technology is involved. Indeed, poor facilitating skill for in-person meetings might be even worse in virtual meetings. At the same time, virtual meetings are very different and it is important to manage them accordingly.

When organizing virtual association meetings it is important to distinguish between meetings held with in-room audience and some remote attendees, and meetings in which all participants attend remotely, because it is not easy to meet the needs of both audiences when they're combined. Videoconferences are now enriching the experience without making it necessarily simpler and newer technologies keep challenging the facilitation and mediated interaction within the meetings. In any case, a golden principle for the organizers is to continually think about the remote users' perspective, especially when there is no visual contact, in how to foster participation.

Participation is a key element in virtual meetings but opportunities for distraction are more numerous in online meetings than in face-to-face gatherings (e-mail, chat or others, for instance), which can decrease meeting effectiveness. Promoting involvement, participation and feedback are crucial. Different techniques and resources should be explored to ensure it, from carefully selected questions that require short interventions from all participants, to web conferencing software interactive features (like instant polls).

Board members are not always in the same time zone, and that should be considered in advance. It is important to be aware of the time of the day for every participant and its impact over their participation, because having some of the members crossing over their lunch hour or making them come early or to stay late at work can shape conversations differently. On the other hand when there are not many time frame choices, it might be necessary to alternate different schedules and to be flexible, so as to make all board members feel comfortable.<sup>ii</sup>

Technology should also contribute to meeting effectiveness. With increasing possibilities it might seem difficult to decide which resources are the most appropriate for virtual encounters (live meetings, group support systems or collaborative document-building tools, among others) however technology should serve the objectives of the meetings or it will hinder the interaction rather than facilitate it. "Select technology tools that best support different kinds of virtual meetings: communication, data gathering, idea generation, team building, problem solving, decision making."<sup>iii</sup> The meeting's agenda and technological resources available to everyone) should determine the technology needed. Board chairs and meeting facilitators should also make sure that every participant knows how to use the selected technological resources, that necessary resources are set up in advance, and that there is a backup plan for eventual failures.

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<sup>i</sup> Cf. Heathfield, Susan, "Effective Meetings Produce Results: Tips for Meeting Management. Ensure Results by Your Actions During the Meeting", *About.com: Human Resources*, available at

[http://humanresources.about.com/od/meetingmanagement/a/meetings\\_work\\_2.htm](http://humanresources.about.com/od/meetingmanagement/a/meetings_work_2.htm). There is abundant literature on meeting facilitation and only some fundamental aspects are included here.

<sup>ii</sup> Cf. Schindler, Esther (2008). "Running an Effective Teleconference or Virtual Meeting" available at  
<http://www.cio.com/article/print/184550>

<sup>iii</sup> Nancy Settle-Murphy, principal and owner of Guided Insights, cited in Schindler, *art. cit.*