Project Pointers

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Think about a large meeting you attended within the last few weeks. List the names of the people who attended and estimate the hourly rate of pay for each person. Then multiply each pay rate by the amount of time each spent in the meeting and add all of these individual dollar amounts. When you have this total salary investment figure, add to it the cost of preparation time, follow up time, materials used, refreshments, cost of room rental, etc. What did the meeting cost? Was it worth it?

If an issue can be resolved without a meeting, cancel the meeting!

Meetings are such an integral part of nonprofit life that they are taken for granted. During the project life cycle, meetings will occur for a **variety of reasons.** What matters most is that the meetings be necessary and intentional. Before asking a group of busy people to schedule time to meet, take a deep breath, slow down and ask, "Is this meeting necessary?" If the answer is no, alternate ways of communicating can be used. Telephone, email and fax inquiries may be effective for some information collection. Only situations that require in-person, collective discussion and information exchange should result in a meeting.

Calling too many meetings will quickly lead to resentment among team members, their supervisors and their colleagues. Changing the meeting times frequently also confuses people—set a regular time and stick with

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it. Absences affect many people in an organization. These inconveniences should be minimized.

Also, it may not be necessary for the entire team to attend every meeting. Depending on the complexity of the project, the team may divide into work groups that meet independently and report back to the larger group. And some meetings may be open to anyone who wishes to attend. This is often helpful in terms of generating new ideas.

Meetings serve many **different purposes.** Some are for information dissemination. Some are for brainstorming. Others become quasi-focus groups in nature. And some are a combination. What matters is that the people attending the meeting have a clear purpose in mind before they arrive. This is especially true if they have been asked to present status reports. Try to circulate a written agenda in advance, then distribute minutes or a follow-up log within a day.

The **purpose** of most meetings falls into one of these categories:

- Imparting information or advice
- Addressing grievances or arbitrating
- Making or implementing decisions
- Generating creative ideas
- Presenting a proposal for discussion
- Resolving issues.

The intention must be clear!

You may **facilitate** the meetings of the full group or the team contract may call for a rotating chair. This can work well when people prefer to share the responsibilities. You should show genuine interest in the comments of team members and watch for body language. Listening is more important than talking and questions should be asked in a non-threatening manner to encourage easy discussion.

All parties should know at an early stage in the proceedings if they will be dealing with any **confidential issues** in a meeting. The best way to deal with confidentiality is to include it as a key component of the Team Contract, the operating charter or "deal" created at the initial team meeting. But even with this contract in place, there may be times when the boundaries are not clear. It is always a good idea to clarify with the group what topics are to be kept among team members only. If an agenda contains a mixture of confidential and non-confidential items, ensure that the status of each item is made clear to all of the participants in advance.

For highly sensitive topics, team members should discuss in advance the consequences of **privacy violations**. For example, in a merger situation where staff positions may be eliminated, team members should be reminded of the impact of meeting "leaks" in terms of employee retention and morale. And confidentiality is a constant issue when the projects include client data, especially if it has a clinical component. If you are serving as project manager and learn or suspect that confidentiality is not being honored, it is best to raise the issue with the group as soon as possible. In a serious situation, you may need to talk with each team member privately to assess the level of damage to the project.

A project is an organized, temporary endeavor that creates a unique product or service.

To keep things on track, it is very helpful to **prepare an agenda** and distribute it in advance of the meeting. An agenda is essentially a list of items or issues that need to be raised and discussed. It should be short, simple and clear. First, gather all relevant information, then sort out which items need to be discussed and in how much detail. You may find it helpful to consult with other participants. If there are too many issues to discuss, assign a time limit to each item so you do not overrun the meeting time. Try to keep the agenda to one sheet of paper.

Following the meeting, make sure the **minutes** reflect the order of the agenda. Minutes should be brief and may be written in note or bullet style. They should be prepared and routed as soon as possible following the meeting while discussion is fresh in team members' minds. And, the minutes should be totally understandable to those who did not attend the meeting. Depending on the group's preferences, the document may serve as a follow up log as well. Again, this format should be decided at the first project team meeting.

A good set of minutes can also serve as a project history. Since most projects require a final, formal report, the minutes can jump-start that writing process and serve as an excellent reminder of what happened when.

Pacing a meeting correctly is an important part of the role of project manager. At the start of the meeting, remind the team how long the meeting will last. Be sure and start on time and stay within the minutes allotted. If people habitually arrive late, be sure and review the Team Contract as a group. If promptness is not one of the items in your agreement, then add it and remind the group that they adopted this change. Do not recap for those who arrive late—this is not fair to those who arrived on time and it may not allow you to finish on time. And, it may be helpful to schedule meetings before lunch—that may keep people motivated to end on time.

If a meeting is dragging, try to pick things up by changing position or tone. Stand up, speak louder, walk around or suggest a break. Consider skipping nonessential items on the agenda if all participants agree. Then arrange a follow up meeting to cover any unfinished items if it becomes clear that some topics are going to take longer than is practical. Also, the actual physical qualities of the meeting space may be contributing to a sense of dragging. Open windows, move the table, or close the blinds—whatever can change the scene and give a fresh perspective.

But even with the best meeting practices, conflicts do occur. The next *Project Pointers* will offer tips on confronting and resolving team conflicts.

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