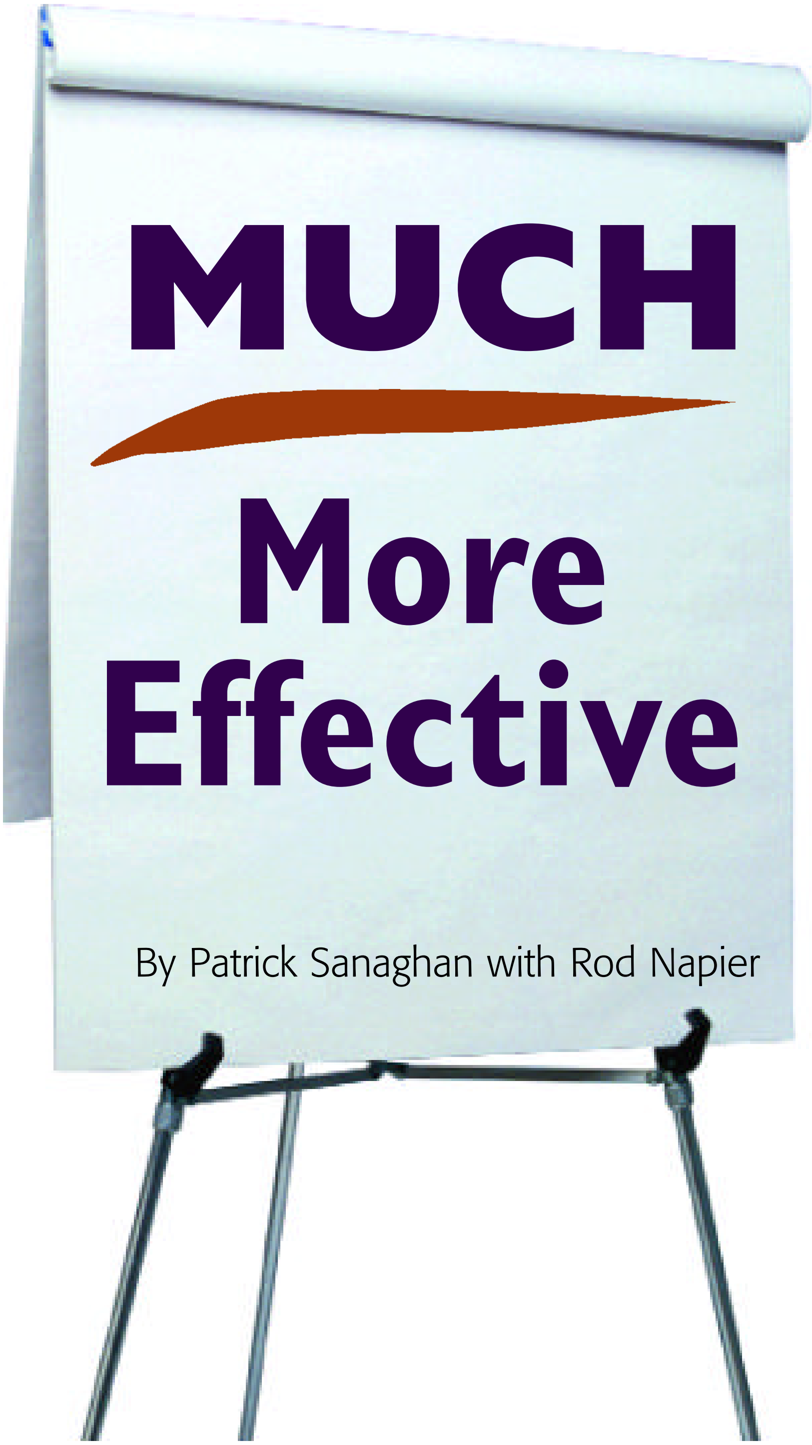
Make Tomorrow's Meeting MUCH More Effective



By Patrick Sanaghan with Rod Napier

Could your meetings use a boost? Do people routinely arrive late? Does one person dominate the discussion? Do others daydream? This excerpt from a new NACUBO book offers you help in designing—and running—successful meetings.

Editor's note: NACUBO's latest release, *Intentional Design and the Process of Change,* to be published this month, offers both theory and practice. The first half of the book examines the process of change. (A chapter from the first half appeared in the October 2000 issue of *Business Officer*—see "Deep Lessons About Change in Higher Education." Another chapter from Part 1 will appear in the February 2002 issue of *Business Officer.*) The second half of the book is composed of intentional designs for holding successful meetings. What follows is an excerpt from Part 2.

Intentional Design and the Process of Change provides a selection of collaborative activities or "designs" that have proven to be highly effective on campuses throughout the country. By design we simply mean: "The creative process of planning and facilitating a set of activities that move a group successfully toward conscious goals." These designs have been used in:

- strategic planning efforts involving hundreds of stakeholders throughout the institution;
- technology implementations where campus communication, education, and buy-in were essential to the success of very expensive projects;
- self-studies in preparation for external accreditation (e.g., Middle States);
- curriculum reviews and renewal with faculty;
- communication meetings where an institution wanted to listen to and develop positive relationships with their neighbors; and
- large-scale change processes that impacted the entire campus (e.g., establishing a satellite campus; redesigning a school; implementing a new financial management system).

The designs work.

We use design in our everyday lives, such as in planning a party. You might consider that you are organizing a design event with the same planning elements, but with very different purposes. Therefore, each design has very different sets of activities to help achieve desired outcomes.

As an "intentional" change leader, you have to develop a "design mentality" when planning and facilitating meetings throughout a change process. There are four key elements that every change leader needs to understand and pay attention to when selecting and using these activities. They are: purpose, stakeholders, design, and logistics.

Purpose

To define your purpose(s), or what it is you want to accomplish at a particular meeting you are planning, is the most important thing you can do in a change management process. It is often the most difficult thing to define. It is helpful to consistently ask yourself, "What is my hoped-for outcome(s)?" For example:

- Am I deciding something or seeking input?
- Do I want to share information or solicit feedback?
- Do I have a problem I need help in solving, or do I want to provide the solution and test its validity?

- Do I want to create the opportunity for people to share their accomplishments or their concerns?

The answers to each of these questions determine very different purposes. Each of these purposes needs a different set of activities or design in order for them to be accomplished.

Once you have defined your purposes clearly, then you can begin to think about whom (the stakeholders) to invite and what the design needs to be. Without a clearly understood and articulated purpose, everything else will suffer.

Communicate your purpose(s) to the invited participants before they attend the meeting. Prior to the meeting they should clearly understand what the meeting is about.

Stakeholders

Next, consider who needs to be at this meeting or series of meetings to accomplish the purpose. If you want to solve a complex problem on campus, then you may want to have participants who have some experience with the problem, could be impacted by the problem, or can provide creative ideas and approaches to the problem. These may be three distinctive stakeholder groups.

We define stakeholders as those individuals who have a stake in the institution. On any given campus, you can have scores of potential stakeholders, such as faculty, community members, alumni, legislators, neighborhood activists, staff, or parents. The challenge for the change leader is to define and determine what stakeholders must be involved in a change process or a particular meeting.

Design

Now comes the interesting part. Once you have defined your purpose and selected the stakeholders that need to be involved, you must select the right design. We have established three levels of difficulty with the designs featured in our book:

- ***Easy:*** This means the design is suited for a novice. If you read the descriptions of the activities in these designs and follow the instructions carefully, you will be successful.
- *Moderate:* This indicates some level of difficulty in the design. You should have some experience in facilitating meetings, giving instructions, providing examples, and managing group dynamics.
- *Challenging:* These designs need an experienced facilitator or change leader. If you have several years of facilitating experience, then you will be successful in implementing the design. Often these designs deal with large groups (50-78) or have several steps. None of the designs are overly complex or complicated, but they do take real experience.

Assuming that you have a clear purpose, the right people coming to the meeting, and an excellent set of activities to achieve your purpose, never forget that the "devil is in the details."

Logistics

Assuming that you have a clear purpose, the right people coming to the meeting, and an excellent set of activities to achieve your purpose, never forget that the "devil is in the details." This final element is as important as the other three, but is often neglected. It can spell disaster or failure if you don't pay attention to it.

Logistics involves all the physical things that need to be carefully planned. It is helpful to have your own "punch list" of items for your meeting. For example: flipcharts and easels; magic markers (plenty of them); masking tape; computer connections, if you are going to utilize Microsoft PowerPoint© software; paper and pens; moveable chairs. You get the idea. Think through your design, and write down all the physical things that you will need to successfully implement your plans.

Some additional advice regarding logistics: 1) Show up early, prior to the appointed meeting time. Then, if anything is wrong, you have time to fix it. 2) Make sure you have seen the room you will be using. A diagram is rarely helpful. By visiting it, you get a feel for the room; understand its strengths and drawbacks. (We had a meeting in one faculty dining room. The president bragged about how beautiful and large it was. "You guys are going to love this room," he told us. We didn't visit the room beforehand and when we did show up, six "beautiful" pillars blocked everyone's view in the room. It was a great place to eat, but not to meet.)

Lastly, because these activities are designed for maximum interaction and participation, they encourage movement. Make sure you have enough space for people to feel comfortable and move around. People don't like to feel cramped, especially if you have a daylong meeting. Remember, a large room can always be made smaller by rearranging chairs and flipcharts, but a small room can't be enlarged. Bigger is always better.

It is important as a change leader to understand and, more importantly, agree with these principles. If they don't philosophically match your way of doing things, they will not work.

The following design from our book is an excellent one to try for an upcoming meeting. It meets many different needs for a successful outcome.

THE CAROUSEL DESIGN

(Level of difficulty: EASY)

I. Goals/Outcomes

1. To gather information from a number of people in an efficient and interesting manner
2. To fully involve all participants in creating a data base about key questions
3. To manage the information efficiently and identify areas of priority

II. Background/Context

This design is an adaptation of a classic design and has several names: The Gallery Walk; The Walkabout; and The Carousel. All the names indicate movement, which is one of the key elements of this design. During a change process, leaders need to find ways to engage stakeholders and receive information and feedback from them. Because colleges and universities rarely have enough time for discussion and dialogue, different ways to solicit information are needed.

This design is one of the most interesting data-gathering designs we know. It is highly interactive and participative and, most importantly, very time efficient. This design can be used in a variety of ways to gather information about: 1) organizational climate, 2) stakeholder concerns, 3) a S.W.O.T.'s analysis—Strengths/Weaknesses/Opportunities/Threats, or 4) to get advice about organizational problems. This design has an adaptation where you disseminate, rather than gather, information.

III. Logistics

Materials: Flipcharts, easels, magic markers for all participants, tape, timer, bell, or chimes

Space needs: Large, comfortable room where participants can move around easily

Time frame: 1 to 1-1/2 hours

Number of participants: typically 10-40

IV. Implementation

We will use 20 participants and four questions as a model for this design.

The leader will have to do some upfront homework with this design and be very clear about the purposes of the meeting. If you want to do a S.W.O.T's analysis about the institution or particular division, you would utilize four classic questions:

1. What are the strengths of our institution? (What do we do well?)
2. What are areas of weaknesses for our institution? (What do we need to improve?)
3. What are some opportunities we should be taking advantage of? (What excites you?)
4. What are some threats to this institution? (What makes you nervous?)

If you were to use this design to seek advice and information that would help the institution, you might ask the following questions:

- What are the three greatest sources of tension within the college or university?
- What is some advice you can give senior management that would improve institutional morale?
- How can we further improve campus life for our undergraduates?
- How can we further improve communication throughout the campus? Please be specific.

Once you have determined your focus questions, you should create four separate stations throughout the room with an easel and flipchart paper. Each station should have a focus question at the top of the flipchart.

The facilitator should have the group of 20 break into four groups of five participants. Do this by counting off one to four. This will give you randomly selected groups.

Make sure that each participant has a magic marker and have them stand in front of their assigned easel with the question written on the flipchart. (When the group counts off, and you are number 3, you go to station #3.)

The facilitator should let participants know that their goal is to read the focus question at the top of the flipchart and individually record their responses to the question. This is not about group agreement. We want individual responses. (This is why everyone has a magic marker.) If participants agree with other people's ideas, they can indicate their agreement by checking off the idea. Each group is given 5 or 6 minutes to read the focus question and individually record responses.

An example: How can we further improve communication throughout the campus?

- The president's office should produce daily e-mails about campus events.
- Re-institute the campus newsletter.
- Have face-to-face meetings with each division.
- Use the campus Web page to keep people informed. ➤

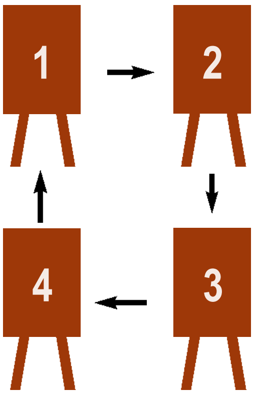
- Have the president visit our staff meetings.
- Hold the convocation twice a year.

At the end of 5 or 6 minutes, the facilitator should indicate by ringing a bell or chime that each small group of five should move clockwise to the next station.

Each group then reviews the input from the previous group, individually checks off the ideas with which they agree, and adds their own ideas to the list.

This process continues until all four groups have answered each question individually by rotating to all stations.

Once all questions have been answered, have each group return to the question where they first started. There will be a lot of new information added at this question/station. Give them several minutes to read the new information and indicate agreement by checking off the answers to the focus question.



The last step in this design is to have each original group report on the top four or five answers for their focus question. These will be easily recognized by their check marks. Keep this mini-presentation to about two minutes. The goal is to indicate the most important ideas and gain closure with this culminating activity.

Schedule

1. Facilitator welcomes participants, shares purposes and directions for the activity. (10 minutes)
2. Facilitator utilizes a counting off method to create randomly mixed groups. (5 minutes)
3. The four groups answer the focus questions and rotate to all stations. (20-25 minutes)
4. Groups return to their original question and read the information and check off ideas they agree upon. (10 minutes)
5. Small groups select the top four or five ideas/answers for their focus question and prepare a brief presentation. (5 minutes)
6. Each small group makes a short presentation about their top four or five answers. (10 minutes)
7. Facilitator thanks participants and explains how the information will be utilized. (2-3 minutes)

Total time: approximately 1-1/4 hours

Following is a second design from the book that is more challenging.

INTERVIEW DESIGN

(Level of difficulty: MODERATELY CHALLENGING)

I. Goals/Outcomes

1. To gather information from relevant stakeholders about key issues regarding a change process
2. To ensure the full participation of everyone engaged in the activity
3. To prioritize a large amount of information into "chewable chunks"
4. To begin to identify organizational issues that need to be dealt with effectively during a change process
5. To understand how to generate alternative solutions

II. Background/Context

This design is one of the most powerful, engaging, and effective meeting designs we know. It is one of the classic designs that has been around for many years and has stood the test of time. People who have experienced it report that they believe it is one of the most interesting, collaborative, open, and strategic meetings they have ever participated in.

The interview design can be used at the beginning of a change process and during a change process to diagnose or benchmark progress. Or it can be used at the end of a change process to distill lessons learned. As long as you have the right purpose, great questions, and the right people in the room, you will be amazed by the results.

One of the things that makes this design so effective is that you can use it with large groups (50 to 75, even 100 participants) and it will take the same amount of time. It is impressive to see 100 people working together collaboratively, sharing ideas and information, and creating prioritized and strategic information in about 2 hours. The interview data is undeniable because it is collected with everyone's input and in full view of everyone.

This design creates a somewhat difficult logistical challenge (i.e., moving people around) and needs some upfront planning to be successful. It is well worth the effort.

Another key to the effectiveness of this design is the creation of engaging and interesting questions. It is most effective for the change leader to work with a small group of people who know the institution well and craft the right questions. This way you ensure that the quality of the questions is top-notch.

The following are some sample questions you might use at different stages of the change process. These questions are generic, but will yield valuable information.

1. Before starting a change process (seeking advice) ask:
   A. What is some advice you would like to give the president as we begin this change process?
   B. How would you like to be kept informed during the change process? Please be specific.
   C. What are your major concerns regarding this upcoming change process? (What makes you nervous?)
2. Sometime during the change process (diagnostic) ask:
   A. What is the "word on the street" regarding our change process? (can be positive or negative)
   B. How can we further improve collaboration throughout our campus?
   C. How would you rate our communication system? Any suggestions to improve?
3. After a change process (distilling lessons learned) ask:
   A. As you look back over the change process we have been engaged in, what are three things that went well?
   B. What are three things that went wrong?
   C. Was communication effective during our change process? Why/Why not?
   D. If we were to undergo the same process tomorrow,what would be the most important thing we need to be aware of? Why?
4. Other questions you could use for different purposes are:
   A. What are the strengths of our institution? What do we do well?
   B. If you were to describe the quality of our campus life to a friend, what would you say?
   C. What are the norms of this institution? (These could be constructive or destructive.)
   D. What are three things that keep us from being excellent?
   E. What are three suggestions you could make to improve institutional morale?
   F. If you were the president, what are three things you would change on campus? Why?

One of the key elements of this design is to create engaging, informative, and strategic questions for participants to answer.

III. Logistics

Materials: Flipcharts, markers, notepads, pens, and moveable chairs

Space needs: Very large, comfortable room

Time frame: Approximately 2 hours

Number of participants: 10 to 100

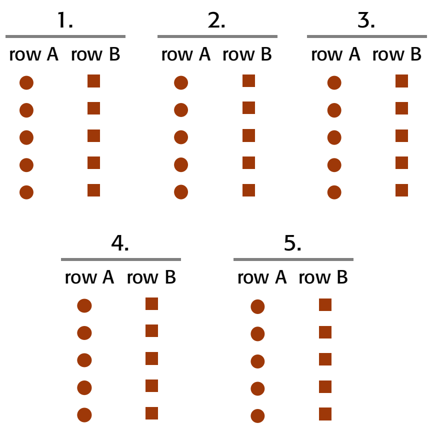
IV. Implementation

We will use 50 participants as a model for this design.

1. The room should be arranged in pairs of rows facing one another. In our working example we have five (5) questions and 50 participants.

2. The facilitator welcomes participants, explains the purposes of the meeting (e.g., "To diagnose where we are in the change process" or "To seek your advice before we undertake our change project" or "To distill lessons learned from our recent change process"). Each participant should have a pen and notepad.

3. The facilitator would then "walk" participants through the logistical directions of the Interview Design. They are:
   A. The participants in Row A will start the interview process. They will ask their "partner" across from them in Row B their focus question and record their partner's responses for 2-1/2 to 3 minutes.
   B. Then participants in Row B will ask their partner their focus question and record their responses for 2-1/2 to 3 minutes.
   C. After Rows A and B have asked and answered a question, that is the end of a "round." People in Row B move down one seat, and one person at the end of Row B rotates to the other end seat. You now have a new partner with a new question, and the original process continues (i.e., Row A asks their question and records it, then Row B asks their question and records it). You will continue the “rotating" seats until all the questions have been asked and answered. At the end of approximately 30 minutes, every person will have been interviewed five times and will have interviewed five people.

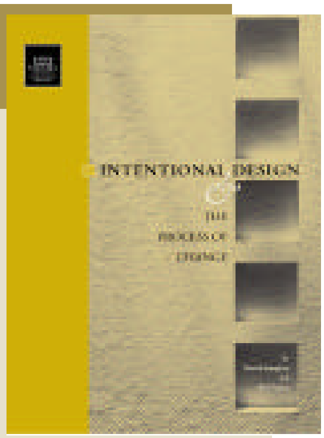


After you explain the logistics, ask for any questions or clarification and let the first part of the meeting begin.

After the initial data gathering/interviewing process, have participants sit quietly (for 15 minutes) by themselves and organize their interview data into the following three categories:

Facts. These are the responses or answers expressed by almost every person that was interviewed. They are very strong ideas and are consistent across participants. They leap off the page.

TO ORDER THE BOOK



Years of experience, combined with conversations with hundreds of change leaders at colleges and universities across the country, have brought the authors to this book concerning underlying lessons about change. In *Intentional Design and the Process of Change,* Patrick Sanaghan and Rod Napier, well-known consultants in the field of higher education, emphasize that intentional process design and collaborative leadership are strategic answers to managing organizational complexity and change. While almost everyone embraces the concept of change, its actual process is rarely easy or comfortable. But take heart, the process is manageable, particularly if you read how to do it in this book. Copies may be ordered at www.nacubo.org or by calling toll-free: (866) 348-6300.
Member price: $59.95; nonmember price: $79.95.

Trends. These are the responses given by about half the respondents. If you interviewed five people, and three people expressed a similar idea, it is a trend.

Unique Ideas. These are individual ideas that represent a different or unique approach, perspective, or idea. (It is not a laundry list of every idea, just the unique ones.)

4. After individuals have organized their interview data into one of these three categories, have them join with others who have the same question. In our working model, you would have five stations (one for each question) and have 10 participants at each station.

5. Instruct the participants to take 30-40 minutes and "pool" the information regarding their focus question and put the facts, trends, and unique ideas for their focus question on flipchart paper.

Here's an example of a possible focus question:

What must leaders do if they are to be successful with this change process?

Facts:

- They must be visible throughout the process.
- They must listen to people.
- They must engage as many stakeholders as possible.
- They must communicate openly with all stakeholders.

Trends:

- Look at best practices from other colleges before you begin.
- Let us know how decisions will be made.
- Measure progress throughout the process and communicate results.

Unique Ideas:

- Involve the community somehow.
- Talk to Byrne College – they did this last year.
- Have regular breakfast meetings to keep people informed.

After the five focus questions groups have created their facts, trends, and unique idea for their question, have each group present their findings to the larger group. (Have an identified presenter do this for each group.)

After the presentations, the facilitator can lead a brief discussion about participants' reactions to the shared information. Keep this to about 20 minutes.

6. It is important to let participants know what will happen to their information (e.g., go to the president's council; change management task force; vice president's group; etc.).

Schedule

1. The facilitator welcomes participants, explains the purposes of the meeting, and walks through the directions. (10-15 minutes)
2. Participants interview each other about the assigned questions. (30 minutes)
3. Participants individually organize their interview data into "truths," needs, and unique ideas. (15 minutes)
4. Groups work with "like" questions, pool their information, and create presentations about their interview data.(30-40 minutes)
5. Groups report their findings. (10-15 minutes)
6. Facilitator conducts a brief discussion about people's responses to the overall data. (15-20 minutes)

Total time: approximately 2 hours

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