

Thinking & Learning

Conference



DR BRUCE WELLMAN

Saturday 23 May

**Making Meetings Matter: How to Be
Time Effective and Time Efficient**

Session 1

MELBOURNE

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Making Meetings Matter

How to be Time Effective and Time Efficient



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Predictable Dynamics in Groups

WHILE NO group is exactly the same as another, or even as itself from one meeting to the next, there are patterns we can anticipate, that inform meeting design and that influence interaction. These patterns, or tensions, are primary causes for individual and collective comfort and discomfort related to completing tasks, making decisions, and engaging in conflict. Understanding these dynamics provides key information to group leaders. Though patterns vary, some useful generalizations can help in diagnosing, planning for and supporting group development.

Our preferences are sources of judgment; consciously or unconsciously, we tend to be drawn to those who think like us. Four tensions are classic in all groups: the tensions between those who focus on task and those who have a high value for relationship; the tensions between varying needs for certainty at any point in a group process and those more at ease with ambiguity; the tensions between working style preferences, including the need to have rich detail, contrasted with the ability to operate with a wide and long term view; and the tensions for individuals who operate with high degrees of autonomy when they are working in settings that require collaboration. These operating preferences produce discomfort or comfort for both group members and group leaders.

The following descriptions highlight the archetypical ends of a continuum of preference and comfort level. No value is placed on any position on these scales; understanding and anticipating the differences for group members provides key information for group leaders.

Task – Relationship: Group members' work style preferences range from a strong focus on task completion to a strong desire for inclusion and collegueship. The press to balance efficiency with the need to include all voices produces tension in groups. Conflicting values for attention to task and patience with process cause friction, limit productivity and reduce the group's ability to function as a group. We struggle with this dichotomy, particularly when time is tight. Yet, without a unified voice and shared decisions, school improvement processes bog down in implementation.

Certainty – Ambiguity: Individual group members vary dramatically in their need for surety before moving forward with plans of action. For some, a lack of clear and precise definitions, rules and steps in a process halts progress. However, in both planning and implementation, comfort with some degree of ambiguity is essential for initiatives to move forward. When this tension is polarized, groups get stuck and lose momentum.

Detail – Big Picture: A focus on the specifics of projects and plans is a source of comfort for some group members, while for others a wider and longer-term view energizes their work. Wide ranges exist in this dimension of work style preference. While each of these perspectives adds value to group work, tensions emerge when working styles conflict. While the big picture preference can cause impatience with the need for specifics, it is these specifics that are the stepping-stones in a final plan. Those who prefer details can feel lost in navigating the big picture, yet a vision of larger view is necessary to inspire movement and to launch direction.

Autonomy – Collaboration: Traditionally, schools are structured for autonomy. Schedules, reward systems and even the physical plant curtail opportunities for shared professional exchange. We have a limited history and limited skills with collaborative examination of teaching and learning practices. The desire for and habits of individualism reduces the potential for collaboration. Individual practitioners who are territorial about their curriculum and instructional practices and other areas of expertise may have difficulty aligning their thinking to engage in shared decisions and in aligning their work to produce the gains of cumulative effect.

Self-Assessment as a Group Member: Four Dynamical Tensions

Under stress, we tend to revert to our underlying preferences. Fatigue, overload, project and decision deadlines, internal and external social and political pressures, and controversial topics are some of the possible sources of tension that we might experience during group work. Imagine yourself in such a setting as you work in a group of which you are a member. Place a check mark on your likely default positions in such a situation.

| | | | | | | | | | | |
|------------------|-------|--|-------|--|-------|--|-------|--|-------|----------------------|
| Task | _____ | | _____ | | _____ | | _____ | | _____ | Relationship |
| Certainty | _____ | | _____ | | _____ | | _____ | | _____ | Ambiguity |
| Detail | _____ | | _____ | | _____ | | _____ | | _____ | Big Picture |
| Autonomy | _____ | | _____ | | _____ | | _____ | | _____ | Collaboration |

The learning journey is always a quest for increasing flexibility to produce more options for ourselves and our groups. Reflect on the following questions and record your thoughts below.

What are some patterns of discomfort to monitor in yourself as a group member?

What are some hot button topics coming up in your group(s) that will require personal flexibility for you to be a more influential group member?

Self-Assessment as a Group Leader: Four Dynamical Tensions

How we behave as a group leader is not always the same as how we behave as a group member. Under stress, we tend to revert to our underlying preferences. Fatigue, overload, project and decision deadlines, internal and external social and political pressures, and controversial topics are some of the possible sources of tension that we might experience during group work. Imagine yourself in such a setting as you work with a group of which you are the leader. Place a check mark on your likely default positions in such a situation.

| | | | | | | | | | | |
|------------------|-------|--|-------|--|-------|--|-------|--|-------|----------------------|
| Task | _____ | | _____ | | _____ | | _____ | | _____ | Relationship |
| Certainty | _____ | | _____ | | _____ | | _____ | | _____ | Ambiguity |
| Detail | _____ | | _____ | | _____ | | _____ | | _____ | Big Picture |
| Autonomy | _____ | | _____ | | _____ | | _____ | | _____ | Collaboration |

The learning journey is always a quest for increasing flexibility to produce more options for ourselves and our groups. Reflect on the following questions and record your thoughts below.

What are some patterns of discomfort to monitor in yourself as a group leader?

What are some hot button topics coming up in groups you lead that will require personal flexibility for you as a leader?

Assessing Your Group: Four Dynamical Tensions

Under stress, group members tend to revert to their underlying preferences. Groups ultimately develop working styles based on the personalities of individual members melding into a social contract that defines tacit agreements about how the group should operate, especially under duress. Fatigue, overload, project and decision deadlines, internal and external social and political pressures, and controversial topics are some of the possible sources of tension that groups might be experiencing. Think about a group you are presently leading; consider how this group typically reacts under stress. Place a check mark on the likely default positions in these situations.

| | | | | | | | | | | |
|------------------|-------|--|-------|--|-------|--|-------|--|-------|----------------------|
| Task | _____ | | _____ | | _____ | | _____ | | _____ | Relationship |
| Certainty | _____ | | _____ | | _____ | | _____ | | _____ | Ambiguity |
| Detail | _____ | | _____ | | _____ | | _____ | | _____ | Big Picture |
| Autonomy | _____ | | _____ | | _____ | | _____ | | _____ | Collaboration |

For group leaders detecting patterns and anticipating group dynamics are important design and delivery skills. As you plan for upcoming sessions with this group:

What are some patterns you anticipate that will inform your design and delivery choices?

What structures and strategies might you apply to manage the discomforts that may arise as group members engage with their tasks?

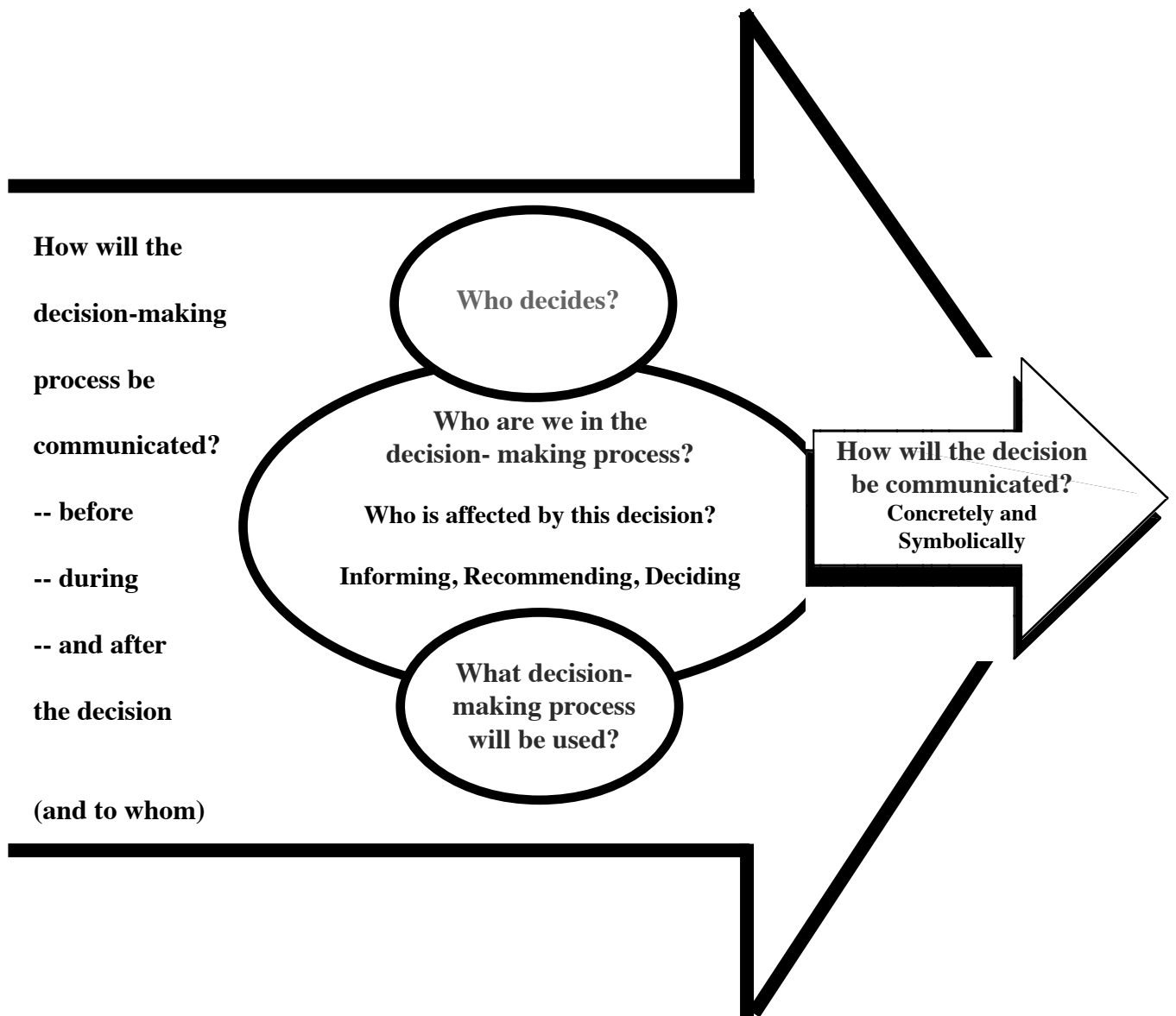
Organizing Principles

1. Meeting success is influenced more by the collaborative norms of the group than by the knowledge and skills of the group's facilitator.
2. The power of the group to produce results is rooted in the quality of the relationships among the participants.
3. In high-performing groups the five energy sources are the self-organizing values for every group and every meeting.

Meeting Success Structures

1. Decide who decides.
2. Define the sandbox.
3. Develop standards.
4. Design the surround.

Decision Making



Decide Who Decides



Clarity

Clarity about decision making is one of the most critical functions related to meeting success. Often group members are not clear about who is making the final decision and what decision-making process will be used. It is important that people trust the process. Decision-making processes will often include these elements:

1. Who decides?
2. Who are we in the decision-making process? (informing, recommending, deciding)
3. What decision-making process will be used?
4. When and how will the decision be communicated to those involved?

Level of Authority

Determining who is making any final decision helps group members know how to proceed. They need to determine who to influence internally and who to influence externally. The following are some possible decision locators:

- an individual or group above you
- an administrator unilaterally
- an administrator with input
- an administrator and staff by consensus
- a staff with input from administrators
- a staff by consensus
- a staff by a vote
- a subgroup of a staff with input from others
- a subgroup of a staff unilaterally
- individual staff members, selecting from a menu of options
- parents and community members
- students

Clarify and Communicate the Decision and Implementation Process

- Identify and periodically examine the full impact and consequences of the decision. Communicate these to all parties involved.
- Involve all parties whose working conditions will be affected by the decision.
- Clarify the time line for deciding and implementing the decision.
- Decide. Then make an explicit statement of the decision or recommendations, summarizing all key points.
- Determine how and when the decision-making group will revisit the decision at a later date to evaluate or revise it if necessary. Commit to a reasonable time period for the decision to work.
- Close the loop. Communicate the reasons for the decision fully and clearly to all affected parties after the decision is made, including how people's input influenced the outcome.
- Plan how to monitor and support the day-to-day implementation of the decision and communicate these plans to everyone involved.
- Evaluate the decision and critique the process.

Saphier, J., Bigda-Peyton, T., & Pierson, G. (1989). How to make decisions that stay made. Alexandria, VA: Association for Supervision and Curriculum Development.

Define the Sandbox



Every group needs to be clear about which issues are within its sphere of responsibility and which lie outside its decision-making authority. Groups conserve precious energy by focusing resources where they have direct influence.

All groups have interests that intersect with other groups' decision-making authority. Collegial and political considerations must honor these overlapping areas of concern.

Individual and collective vigilance in this area is an essential ingredient of group success. Here are some examples of groups for which this structure is important:

- Departments
- Curriculum task forces
- Ad hoc study or advisory groups
- Grade level teams
- Site councils
- Faculties

Here is an example of a school site council defining its sandbox.

- Develop site plan
- Develop budgets
- Consult with bilingual advisory committee
- Consult with Title I parents
- Review student progress
- Review other data such as parent involvement survey
- Recommend the number of staff development days
- Review (annually) school discipline policy

Consensus as the Holy Grail

Consensus is one form of decision making but not the only form. Some groups get stuck trying to use consensus processes without a consciousness of the differences between dialogue and discussion.

There are two types of consensus: (a) opening consensus, which develops through dialogue, and (b) focusing consensus, which develops through discussion (Senge, 1990). Opening consensus means the consideration of perspectives and possibilities. Focusing consensus means winnowing choices by clarifying criteria and applying these criteria to the choices. Focusing consensus for complex issues depends upon effective opening consensus.

Ultimately, consensus is a value and belief system more than a decision-making process. Unless groups and group members are willing to hang out with the process for as long as it takes, they are not usually ready for full consensus decision making.

Work at The Center for Conflict Resolution points to the following necessary conditions for effective consensus decision making (Avery, Auvine, Streibel & Weiss, 1981).

1. Unity of purpose. There should be basic core agreements on what the group is about and how it operates.
2. Equal access to power. Consensus cannot work in formal hierarchies. Informal power also needs to be equally distributed.
3. Autonomy of the group for external hierarchical structures. It is very difficult for groups to use consensus processes if they are part of a larger organization that does not honor this way of making decisions.
4. Time. Consensus takes time and patience. Participants have to believe in the usefulness of this method enough to follow it and not the clock or calendar.
5. Attending to process. Group members must be willing to spend group time reflecting on process and modifying it as needed.

6. Attending to attitudes. Group members must be willing to examine their own attitudes and be open to change. The key ingredients are trust and cooperation.

7. Willingness to learn and practice skills. Communication, meeting participation, and facilitation skills must be continually honed and refined to make consensus processes work.

Sufficient Consensus

Groups with whom we work are usually better served by "sufficient consensus." This generally means that at least 80% of the group is willing to commit and to act. It also means that the others agree not to block or sabotage.

Sufficient consensus relies on both dialogue and discussion for its effectiveness. The norm of balancing advocacy and inquiry is essential. Any dissenting voices must be able to influence and persuade 80% of the group to carry the day. This also means that other group members can paraphrase and draw matters to a close if only a few voices line up on one side of an issue.



Develop Standards



- **One Process**
- **One Topic**
- **Balance Participation**
- **Engage Cognitive Conflict**
- **Understand and Agree on Roles**

Four Possible Meeting Roles

- **Engaged Participant**
- **Facilitator**
- **Recorder**
- **Person With Role or Knowledge Authority**



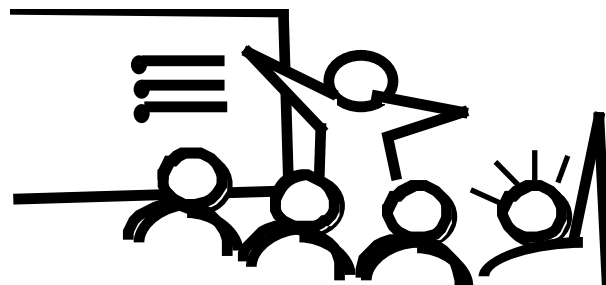
Engaged Participant

- Uses seven norms of collaboration
- Monitors own and others' adherence to meeting standards
- Sets and tests working agreements
- Seeks and provides data
- Clarifies decision-making processes and levels of authority
- Opens the door for others to speak
- Tests consensus
- Listens to own listening
- Is conscious of own assumptions and knowledge and how these interfere with own listening



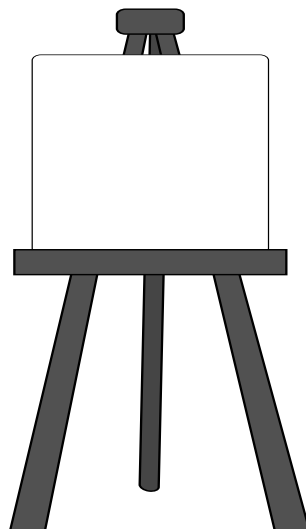
Facilitator

- Remains neutral to content
- Clarifies role with group
- Focuses group energy
- Keeps group on task
- Directs processes
- Encourages everyone to participate
- Protects participants and ideas from attack
- Contributes to agenda planning
- Elicits clarity regarding meeting follow-up



Recorder

- Remains neutral to content
- Supports facilitator
- Records basic ideas as the facilitator paraphrases them
- Keeps eyes on charts and not on group members
- Writes legibly using upper and lower case printing
- Uses alternating colors to separate ideas
- Uses icons and simple graphics
- Keeps all charts visible to support "group memory"



Person With Role Authority

Before and After the Meeting

- Coordinates agenda design
- Develops group-member leadership
- Coordinates the activities of subcommittees
- Sees that meeting follow-through occurs
- Provides for evaluation

Person With Role or Knowledge Authority

During the Meeting

- Informs group about constraints and resources
- Advocates for own ideas
- Inquires about the ideas of others
- Actively participates

Design the Surround

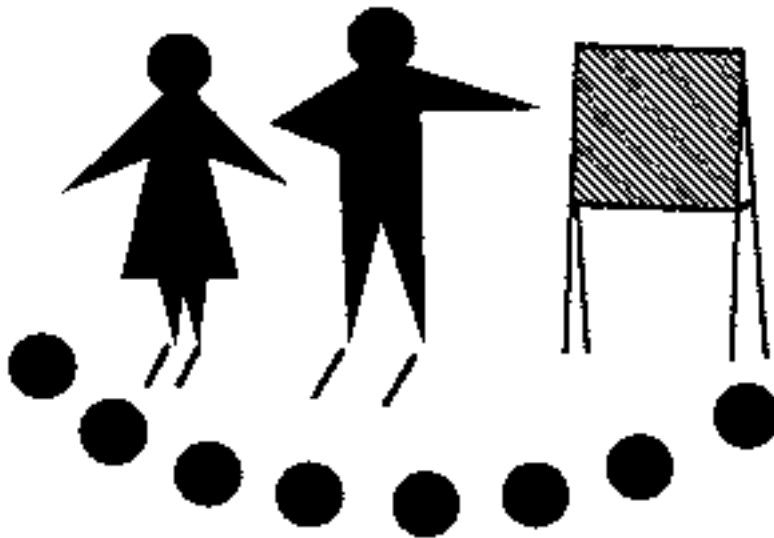


In his book, *Smart Schools* (1992), David Perkins describes "the surround" as the features around learners which by their very presence mediate thinking and behavior. Psychological, emotional, cognitive and physical elements contribute to the surround. Meeting designers and group developers give careful consideration to the following elements:

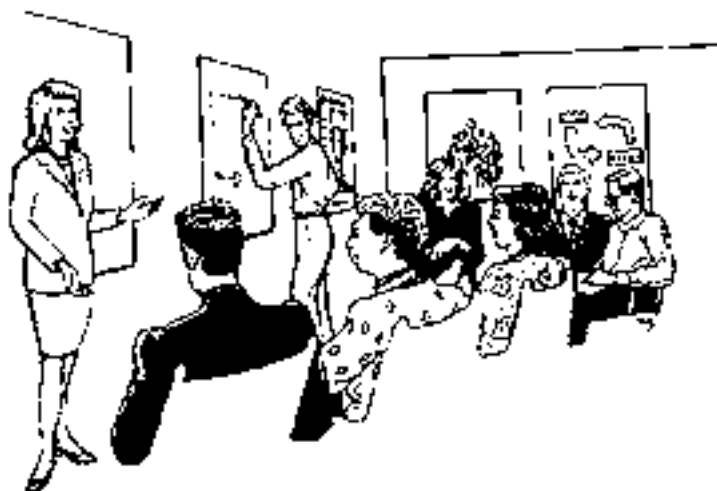
- **Physical space and room arrangement.** Specific tasks require conscious room arrangement and materials provisioning. The room arrangement both communicates and structures the desired interaction.
- **Task, norms and standards charts.** As reminders of task focus and working agreements, high-performing groups position charts stating outcomes for their tasks and charts reminding participants of collaborative norms, meeting standards and group-member capabilities.
- **Charting materials.** Group memory and graphic processes support learning and retention. Charting materials such as markers, tape, pads and easels need to be readily available. Wall space also needs to be considered. Blank walls without other art work are best for meeting rooms. This lets each group craft the space to its own needs.
- **Emotional space.** People do not come to meetings as blank slates. They carry unfinished business from other aspects of their day and from previous meetings. Inclusion activities such as a grounding support people in becoming fully present both physically and emotionally. Group-member consciousness about the emotional surround is also enhanced through processing questions that address both thoughts and feelings.

Principles for Designing the Surround

1. All participants and the facilitator should be able to see and hear each other.
2. The seating arrangements should enable members to focus on the flip chart (or other writing devices) and the facilitator.
3. Seating arrangements should distinguish participants from non-participants.
4. Seating arrangements should accommodate movement, sub-grouping with different partners and personal ownership of the entire room in contrast with identifying with a single chair or table.
5. Memory displays and public recording should support sound thinking about meeting content and processes.



Room Arrangement



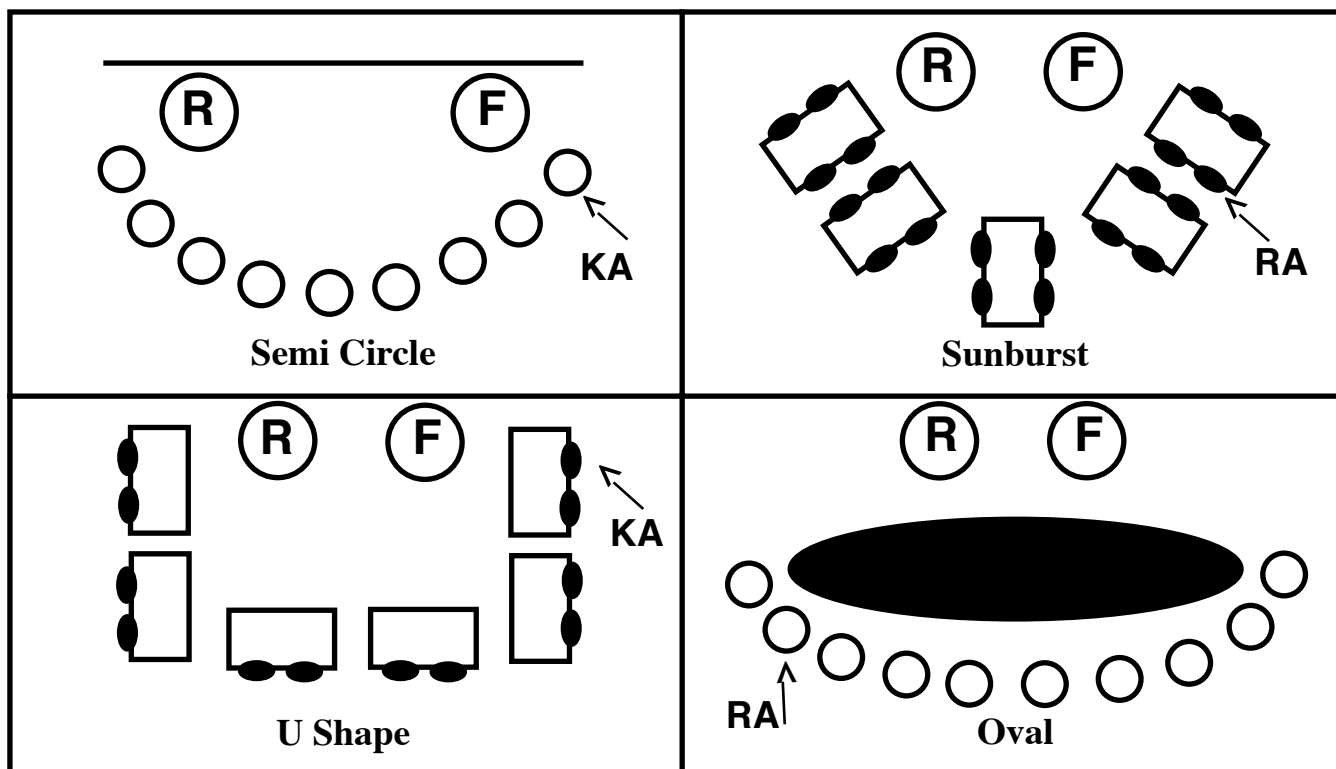
Tips:

1. Face meeting away from doors.
2. Focus on easels, not each other.
3. Keep chairs close to avoid "energy leaks."

Key:

- R Recorder
- F Facilitator
- KA Knowledge Authority
- RA Role Authority

Alternatives:

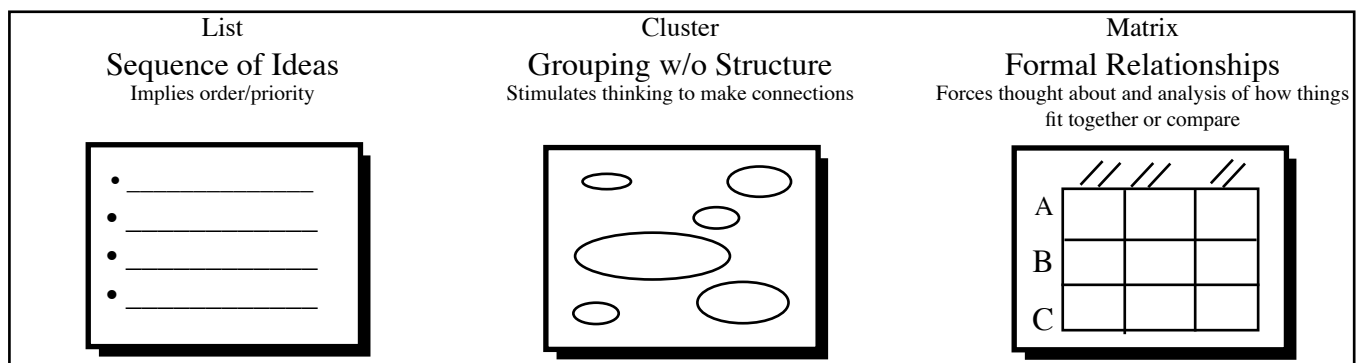


Benefits of Public Recording

- Helps the group focus on a task
- Supports visual learners
- Depersonalizes ideas and problem-bearing data
- Enhances memory of participants during and after the meeting
- Guards against data overload. but holds on to all ideas; frees participants from taking notes
- Develops shared ownership
- Serves as a psychic release for participants
- Prevents repetition and wheel spinning
- Encourages participation by respecting individual ideas and reducing status differentials
- Enables each member to confirm that his or her ideas are being recorded accurately
- Increases the group's sense of accomplishment
- Makes sophisticated problem-solving methods possible by holding on to information developed on one phase for use in the next.
- Makes it easier for latecomers to catch up without interrupting the meeting
- Increases accountability by a public display noting *who* will do *what* by *when*

Tips for Public Recording

- **Materials**
 - Chart paper with 1" grid (27" x 34")
 - Sturdy easels
 - Only water color pens (Sanford: Mr. Sketch, chisel point)
- **Colors (2 or 3 only!)**
 - Earth colors for text and black for organizers (boxes, arrows, etc.)
 - Yellow or orange for highlighting
 - Red only for titles
- **Lettering**
 - At least 2" high
 - Print upper and lower case
 - Consistent alphabet
- **Organizers**
 - Bullets in front of phrases
 - Lines between key lines
 - Box in parts of text
- **Graphic Assists**
 - Shaded Borders
 - Simple pictographs
 - Number the recording pages
- **Visual Thinking Maps**
 - List
 - Cluster
 - Matrix



Meeting Inventory

Decide Who Decides

- We were clear about who we are in the decision making process. 1 - 2 - 3 - 4 - 5
- We were clear about the decision making processes being used. 1 - 2 - 3 - 4 - 5

Define the Sandbox

- We were clear about which parts of the issue(s) we explored live in our sandbox. 1 - 2 - 3 - 4 - 5

Develop Standards

- We adhered to one process at a time. 1 - 2 - 3 - 4 - 5
- We adhered to one topic at a time. 1 - 2 - 3 - 4 - 5
- We balanced participation. 1 - 2 - 3 - 4 - 5
 - The degree to which I felt listened to. 1 - 2 - 3 - 4 - 5
 - The degree to which I listened to others. 1 - 2 - 3 - 4 - 5
- We engaged in productive cognitive conflict. 1 - 2 - 3 - 4 - 5
- We were clear about meeting roles . 1 - 2 - 3 - 4 - 5

Design the Surround

- We managed the environment to support our work. 1 - 2 - 3 - 4 - 5

Topic(s)

Date

Group

Naive Questions

1. How much detail do we need to move this item?
2. Who is making this decision?
3. What is the process for making this decision?
4. What parts of this issue live in our sandbox?
5. Who will do what by when?
6. I'm trying to understand, is this a matter of principle or a matter of preference?
7. What conditions might cause us not to follow through on these agreements?
8. How will we know when we are successful?
9. Is there something we're not talking about that is keeping us stuck?
10. What questions would be useful to ask ourselves?
11. What are our assumptions about this?

Close Meetings with These Questions

1. Who will do what by when?
2. Who will communicate informally and formally to whom?
3. What will be communicated regarding decisions at today's meeting?
4. What are the next steps?
5. Under what conditions would you be tempted to deviate from these communication agreements that we just made?



If... Then...

If I remember to . . .

Then I'll be able to . . .

Learning Partners

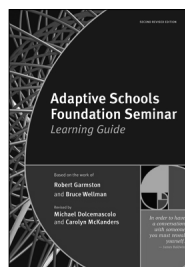
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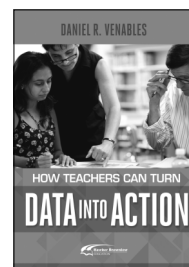


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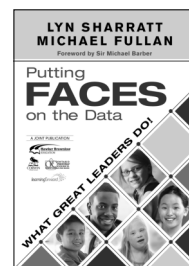
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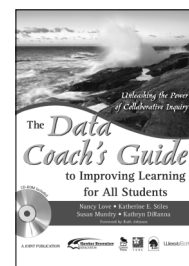
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