

# State Bar of Wisconsin

## Guidelines for Effective Meetings

*In order for meetings to be successful, they must be well planned, organized, and executed. The following outline is a guide to running effective meetings at the State Bar of Wisconsin.*

### Planning the Meeting

- Decide if the meeting is necessary – not every decision requires a meeting
- Identify the participants – who are the “must attends”– base it on impact
- Set up the meeting – using meeting etiquette
- Explain the purpose – state a clear objective

### Before a Scheduled Meeting

**Meeting planners** – Prepare an agenda, effective agendas contain the following elements:

- Agendas should be distributed at least 72 hours before a meeting
- The purpose of the meeting
- The meeting schedule (start and end times, and time allotments for individual talking points)
- The talking points to be addressed
- The persons responsible for presenting or leading discussion on the various talking points
- Directions on how to prepare
- Attach documents and other information you expect participants to review in advance.
- Assign a note taker (or do this at the start of the meeting).

**Meeting Attendees –Prepare.** Read the documents; bring notes/questions; be prepared to present and/or discuss agenda items for which you are responsible. Bring enough copies for group if distributing info.

### At the Meeting

- **Leader** – identify who will be running the meeting
- **Facilitator** – identify the facilitator who **keeps the group on task** and observes rules
- **Clarify the decision-making process** – examples include autocratic, democratic, or by consensus
- **Appoint a note taker** – either prior to or at the meeting
- **Pay attention to time-** If time is running short decide how to address it. Don't drop subjects due to time issues.
- **Enforce meeting ground rules:**
  - Start and end on time – no backtracking for late attendees
  - Begin by rearticulating the goal of the meeting
  - Avoid side conversations
  - Five-minute rule to close out discussions going nowhere
  - Focus on goals--avoid sidetracking, personality conflicts, and hidden agendas
  - Keep an open mind; focus on new concepts and in new ways Keep pushing for better
  - Criticize ideas, not people – respect differences
  - Don't be afraid to suggest change, break out of our normal modes
  - Avoid judgment statements
  - Practice active listening
- **Agree to a timeline** for achieving the group's goal
- **Communicate next steps**
  - **Make clear assignments** Be sure to articulate reasonable deadlines that those responsible for completing assignments should be able to meet
  - Establish how **meeting notes** will be shared with the group and when
  - Discuss scheduling **future meetings** when necessary

### Post meeting

- Assemble and distribute notes within 24 hours, in the manner agreed upon in the meeting
- Follow through on all assignments

## [MEETING]

*\*Tab through form to complete - click on text with [ ] or " " and type your data over highlighted text*

**AGENDA**      [00/00/00]      [Time]      [Location]

**Meeting purpose:**

**Members:**

**Please read:**

**Please bring:**

**Note taker:**

### AGENDA ITEMS

Topic	Presenter	Time allotted
1. "Check-in: Assignment status, materials, new agenda items"		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10. "Wrap-up, next steps, assignments, next meetings"		

*\*To add additional agenda items-highlight entire row (all 3 columns), right click choose "Insert Rows"*

### SPECIAL NOTES:

"Where to find docs, changes in location, special deadlines, etc."



# [Meeting]

*\*TAB THROUGH FORM TO COMPLETE - CLICK ON TEXT WITH [ ] OR " " AND TYPE YOUR DATA OVER HIGHLIGHTED TEXT*

## MINUTES

"[MEETING DATE 0/0/08]"

"[MEETING TIME - 0:00 AM]"

"DRAFT OR APPROVED"

<b>ATTENDEES</b>	
<b>ABSENT</b>	

*\*TO ADD ADDITIONAL AGENDA OR ACTION ITEMS - TAB THROUGH COMPLETED FIELD*

<b>AGENDA ITEM</b>	

<b>ACTION ITEMS</b>	<b>PERSON RESPONSIBLE</b>	<b>DEADLINE</b>
1.		[0/0/08]
2.		[0/0/08]
3.		[0/0/08]
4.		[0/0/08]
5.		[0/0/08]
6.		[0/0/08]

