Better Meetings by Design
Marna Hostetler
Marna.Hostetler@usi.edu
January 2022

All libraries have meetings, but not all meetings are productive. Unproductive meetings are viewed as a waste of time, resulting in low morale and lack of progress on organizational goals. But meetings are crucial to setting goals, formulating policies, removing barriers, and completing projects. Since meetings are a necessity, how can we make them better?

I am the library director at a regional comprehensive public university, and recently completed a Master of Business Administration degree with a concentration in Human Resources. One of the management courses I took covered the topic of meetings, including reading the book *Death by Meeting: A Leadership Fable…about Solving the Most Painful Problems in Business* by Patrick Lencioni[1]. Given the importance of meetings – and their well-known challenges – the knowledge gained in this course inspired me to reconfigure my library's meeting structure.

In the Lencioni book, different types of meetings are explained in detail, although with fictional examples. The meetings in the book are held more often, as the pace of a business is quicker than that of most libraries. Using the ideas in the book, I modified the meeting structure for my library to include five different meeting types for different purposes, as outlined below.

The timing was good for my library to begin using a new meeting structure. We had a new assistant director for public services and a fairly new assistant director for technical services. I formed a new management team, comprised of my direct reports, and we piloted the new meeting structure beginning in the 2018-19 academic year. Now, of course, we are in the midst of a global pandemic, and the working world has adopted virtual and hybrid meetings in response to the COVID-19 virus.

Whether virtual or in-person, it is important to understand that an organization should have different types of meetings for different goals. Too often, organizations use a "catch-all" approach to meetings, leaving no one satisfied and slowing progress toward agreed-upon goals. Effective meetings can range from a 5-minute "check-in" to a day-long off-site retreat, depending on the purpose of the meeting.

Check-in
Check-in meetings are typically 5-10 minutes in length and are conducted standing. These meetings are held only as needed, and are helpful when planning to cover a service desk if the normal routine is disrupted, for example, in the case of illness or emergency. They can also be useful if something out of the routine or unexpected arises, such as an additional meeting added to the schedule for the day, or a problem within the building. These meetings are typically held within an individual library unit and are useful for conveying information quickly and efficiently. In a more virtual environment, I believe that meetings like this could be

handled in a quick phone call, an email, or a group chat environment. One could also set up a quick video call to discuss options.

Tactical
These meetings are used to review progress on the organization's activities and metrics; resolve issues; provide clarity for everyone at the meeting; identify obstacles and remove them immediately, if possible; and to achieve consensus on next steps.

My library held tactical meetings monthly, although the Lencioni book recommended more often. These meetings are recommended to be 45-90 minutes in length and everyone in the management group attends.

Tactical meetings must be conducted with discipline and structural integrity. This is challenging because tactical meetings do not have a set agenda. The agenda arises out of the issues that are brought up by the meeting participants, after initial reporting is complete. The other major point about tactical meetings is that they are not intended for strategic discussions. Specific, short-term topics are the focus. If any strategic issues arise, note and postpone them to the next strategic meeting. It is difficult to resist engaging in discussion of strategic issues, but this is where discipline is crucial. Tactical meetings are not designed for deep discussion, so it would be giving the issue short shrift to attempt to discuss and resolve it during a shorter meeting intended for a different purpose, when people may not be prepared for the discussion.

Tactical meetings are comprised of three parts: lightning round, progress review, and real-time agenda. In the lightning round, everyone lists their top 2-3 priorities for the month. Each person gets a very short time, one to three minutes. In the progress review, the meeting leader reviews 4-6 metrics for the organization and marks progress since the last meeting. These could come from the organization's strategic plan, unit goals for the year, or other planning documents. This activity keeps everyone focused on organizational goals. Finally, the meeting leader, who takes notes during the lightning round, identifies the real-time agenda items, or tactical issues that must be addressed immediately because they are slowing progress. Once tactical issues are identified, they are discussed and – ideally – resolved.

For these meetings, I adapted a form from the Lencioni book and used it for both meeting preparation and note-taking during the meeting. The form is one page, with six boxes. The first box is for Lightning Round notes, which I took as each member of the library's leadership team gave their short unit updates. The second box was where I put my own pre-meeting updates on key metrics, important projects, and strategic plan objectives.

The third box is where I noted potential agenda items for the meeting. Remember, there is no pre-set agenda for tactical meetings. Agenda items arise in real time from the leadership team's updates. Tactical meeting agenda items are short-term issues that are slowing progress, so they are to be discussed and resolved right then and there. If that's not possible, or more discussion or different people are needed, the issue should be shifted to a future strategic meeting.

The fourth box on my tactical meeting form was to note potential topics for quarterly strategic meetings. The fifth box was to record decisions or actions taken in the current meeting and the final box was to make notes on who else within the organization needs to know of the decision or action taken. Your form can be configured any way you like, but as tactical meetings are short and to the point, I recommend some sort of organized form to help you maintain the intended structure of the meeting.

Tactical meetings could easily be conducted virtually or in a hybrid environment, as well as in-person.

Strategic
My organization held strategic meetings quarterly and they were scheduled for 2 hours, although the Lencioni book recommended 4 hours. These meetings are longer than tactical meetings because they are intended for deep discussion, analysis, brainstorming, and making decisions on critical issues affecting the long-term success of the organization. This may seem like too long, but as we know, thorny topics come up in other meetings when there is not enough time to get into details, so issues build up over time. Strategic meetings are useful because they reserve time on the calendar for having the lengthy conversations that are necessary to maintain progress. Ultimately, the time is well spent because it is used to discuss issues that affect the organization in fundamental ways.

Strategic meetings should have only one or two topics on the agenda, one-two hours per topic, allowing plenty of time to explore each issue in-depth. Be sure to set the agenda well in advance so that people can prepare, and consider assigning a discussion leader for each topic. Because the meetings are held less often, the people presenting each topic will have time to do the needed research. The meeting leader should consider opening the discussion with an explanation of why the topic is important, which may be helpful for those who are not directly impacted by the issue at hand.

Strategic meetings can be conducted virtually or as a hybrid meeting. However, the longer meeting time may necessitate a short break between topics.

Off-Site Review
Off-Site Review meetings are normally held once a year – an all-day retreat. These meetings are used to review strategy or to create or revisit the organization's strategic plan. As industries change over time, it is also useful to periodically reassess the organization's strategic direction and review industry trends.

This time can also be used for team review. My organization has used off-site review meetings to perform self-assessments as individuals and as a team, but teams could also use the time to identify trends or tendencies that do not serve the organization or to remind themselves of their collective commitment to the team.

Off-site reviews may be more difficult to accomplish in a virtual or hybrid environment, merely because it can be difficult to maintain focus for long periods of time in an online meeting. For a retreat that must be held virtually, it might be best to break up topics into shorter meetings, perhaps held over a week or several weeks. It may be more difficult to accomplish the focus provided by a true retreat away from the workplace, but deep discussions can still occur without requiring multiple hours in front of a computer screen.

Librarians' Council
My organization maintained a meeting type that was in place before the meeting restructure of 2018. These are monthly meetings for librarians and unit heads and are used for product demos, guest speakers, or group discussions. These meetings have also been used for visits from the provost; to meet new upper-level personnel on campus, such as the Dean of Students or Vice President for Student Affairs; or to hear about new programs or initiatives from elsewhere on campus.

These meetings are more informal and if one or more people are unable to attend, they are not rescheduled. Often, if no topic comes to mind, the meeting is cancelled altogether. Council meetings can work in either a virtual or hybrid environment, as well.

Healthy Conflict and Full Participation
Even if no changes are made to your organization's meeting structure, following good meeting guidelines can improve efficiency. Agendas should be set ahead of time to give people time to prepare, such as asking colleagues for input or compiling needed data or statistics. Every effort should be made to include everyone who works with the topic at hand, and meetings should be scheduled with participants' schedules in mind. For example, if one person in the group works the evening shift, meetings should be scheduled for afternoons.

All meeting participants should engage in productive conflict. The meeting leader should expect and feel comfortable with some silence as participants digest what is being presented, and aim to keep the discussion on the topic, not personalities. The meeting leader should enforce the "one person speaks at a time" and "no cross-talk" rules. This has actually gotten easier in the online environment, but over time, as organizations move to more in-person or hybrid meetings, this will remain important.

In sum, the meeting restructure worked well for me as the library director and for my colleagues. I admit that the tactical meetings at first felt very strange to all of us, especially as we had been trained to always prepare meeting agendas ahead of time. However, tactical discussions are very useful and the group adapted to the meeting structure over time. The new overall meeting configuration enhanced communication between me and my direct reports and within the management team. Morale improved because progress toward organizational goals became part of our regular meetings and time was regularly set aside to discuss those large, difficult issues that every organization has to manage. These changes led to better results.

I would encourage you to review the meeting structure at your library and try some new approaches. After all, meetings are necessary so we should make the most of them.

Sources

1. Lencioni, Patrick. *Death by Meeting : A Leadership Fable-- about Solving the Most Painful Problem in Business*. 1st ed. San Francisco, CA: Jossey-Bass, 2004.