PATRICK TOMLINSON ASSOCIATES
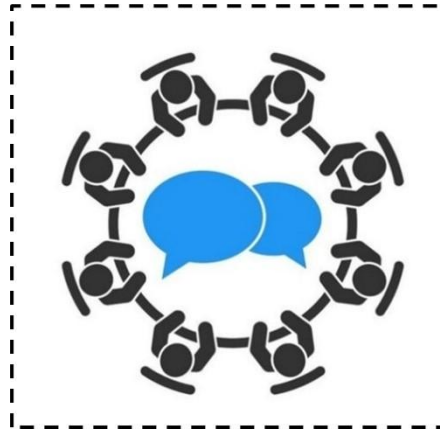
EFFECTIVE WORKPLACE MEETINGS: TASK, LEADERSHIP, DYNAMICS, AND CULTURE
PATRICK TOMLINSON (2024)

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INTRODUCTION

This article highlights the structure and task-related issues relevant to planned meetings in the workplace. The principles apply to group and individual meetings (see Appendix) though I will focus on group meetings. The principles are based on my experience of chairing and attending over 15,000 meetings (during 40 years of work) and on research-informed evidence. According to some research over 20 hours a week spent in meetings is the average for executives in the USA (Perlow, et al., 2017). As we know meetings are costly in terms of time and expense. They are even more costly when the outcomes are negative. Commonly, research finds that over 50% of attendees find meetings negative and unproductive.

Considering the time spent in meetings, especially for managers and leaders, it often seems to me that not enough attention is given to getting the approach right. The purpose of a meeting is to have a positive impact on the organization's primary task - the task it must perform over and above everything else – the reason for its existence (Rice, 1963). There is the risk of a poorly organized and led meeting. As I am sure we have all seen, this can have a damaging impact. As with everything, when something does not work or go well, we can usually learn from the experience and recover. Taking risks, making mistakes, and learning from experience are all part of the process. A well-planned and thought-out meeting process as discussed in this article can help reduce the negative experiences and increase the positive. A meeting checklist template is at the end of the article. This may help to review the clarity of any meeting, its purpose, and its organization. It also provides guidelines for setting up a new meeting.

I wrote the first version of this in 2020 and used the words practical and simple in the title. That was mainly because some of what is involved is simple and the purpose must be practical. I have now expanded the article, partly prompted by recently reading 'Workplace Intelligence' (2020) by Anton Obholzer, which I found immensely helpful in affirming the need for clarity and simplicity where possible. However, it also led me to feel the need to elaborate on the complexities involved to get a better balance between the simple and the complex. I have replaced the words simple and practical with task, leadership, dynamics, and culture to reflect this. The pandemic and changes that have taken place with remote working also made it a timely moment to review the practice around meetings.

What originally motivated me to write this article is the experience of seeing how often what might seem like basic good practice is not in place or followed. And in seeing the negative consequences for everyone involved compared with the positive outcomes that can come from well-organized and well-led practice around meetings. As Obholzer (2020, p.107) states,

"In order for a meeting to run to task, which is to address the duties and functions that the meeting is there to perform, attention needs to be given to how that is to be achieved: as mentioned previously, attention needs to be given to the setting, the seating, the time allocated, as well as the agenda. Agendas and accompanying material need to be circulated well in advance for the individual members to have an opportunity to inform themselves of relevant matters. This advice about how to go about things is so obvious that it would appear offensive to even mention it, were it not for one fact: it seldom happens."

Part of the reason I think it seldom happens is that the complexity and difficulty of chairing some meetings are often underestimated. Therefore, those who run the meetings are also often unprepared (Fernandez et al., 2023). This article aims to give some practical guidance and highlight some of the more complex and difficult aspects.
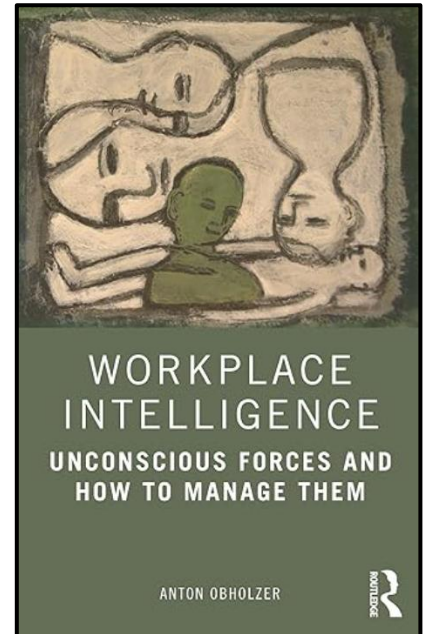
There is some truth in what Obholzer says about advice on meetings running the risk of seeming offensive. It seems that organizing and chairing a meeting is assumed to be an ability that an experienced professional would have. The skills of people who run meetings are seldom challenged. Any training is rarely provided, even on leadership and management courses.

WHY HAVE A MEETING?
The first question should be why have a meeting? What is the purpose of bringing people together to talk about something? Why can't the matters be dealt with by emails or messages? The only response I can think of must be that getting people together and the combined perspectives and thinking made possible is needed to work on complex matters. I believe in the idea that rather than two heads being better than one, it is that two (or more) heads are needed for one. One, being the issue at hand or the task.

If there is no process of thinking, discussion, and debate in a meeting it may well be a simple coordination process that could be worked out by email. Therefore, thinking together can be considered vital to a meeting. But this is not always easy. We may need to work hard to maintain the thinking process especially if our thoughts might be challenging or exposing something difficult. Being open to questions and not closing them down is both helpful and difficult. Obholzer (p.41) emphasizes the importance and difficulty of,

> … observation and thought, and time for thought, before action. This seems a simple, if not naïve, approach. But there is ample evidence that leaders are under constant and relentless

pressure to act, to be seen to be acting, and to act immediately and decisively. Such action can be perceived as impressive leadership, irrespective of whether the action is effective or not, and evidence-based or not.

A good meeting can turn things in a positive or even inspirational direction. A poor meeting can compound a sense of demoralization. A key thing I have learned is that what leads to a positive or negative meeting, is not just the ability of the individuals in it, but the clarity of the meeting process and the wider system it sits within. Talking about one aspect of a meeting, punctuality, Marquet (2012, p.29) the captain of a nuclear submarine suggests that often,

… little things like lack of punctuality are indicative of much, much bigger problems.

The bigger problems might include a lack of - task clarity, expectations, authority, responsibility, and accountability, among others. What happens in a meeting can be a symptom or reflection of the organizational culture. It can also influence and change the culture. Improve the function of a meeting and it will improve the quality of function outside of it. Meetings are an opportunity to observe and model aspects of culture, such as,

- Values.
- Leadership.
- Collaboration.
- Task and role clarity.
- Discipline.
- Boundary management.
- Ownership.
- Responsibility and accountability.
- Decision-making.
- Inclusiveness.
- The nature of authority.

THE CHALLENGES OF MAINTAINING EFFECTIVE MEETINGS
The list above gives a clear indication of why managing, leading, and maintaining meetings is a skilled task. It can be extremely difficult to maintain effective meetings over a long time. A meeting is likely to be a focal point for a team, group, department, or organization. Everything that is going on in those systems may be present consciously or unconsciously in the meeting process. As well as the meeting being important to those in it, the outcomes are often important to many others who are not in it. The organization needs to have a system of monitoring the quality of its meetings and outcomes, holding the appropriate people accountable, and providing support, such as supervision and training.

Human systems are prone to becoming anxious, which causes challenges such as confusion, rivalry, territorial splits, and hostility. An effective meeting can become a space where these potential difficulties are held and thought about. Having such a space may help detoxify and make sense of such tendencies. This creates the potential for a regulating effect on people and systems

outside of the meeting, as well as those in it. If on the other hand, the meeting process becomes dysfunctional it may escalate these dynamics, which may then spread outside of the meeting. Poorly run meetings can have a regressive impact and cause dysfunction in the attendees, teams, and the whole organization. And what is going on outside of the meeting may also make it difficult to run a meeting well. There is a parallel process. What goes on inside the meeting may reflect what is going on outside of it and vice versa.

There is also a natural ebb and flow in human systems. For example, following an especially tense meeting, the atmosphere may need to be lighter in the next. And when things become too light, there is a risk of complacency and switching off, so the balance may need to be restored the other way. It is the skill of the chair as well as all participants to be able to adapt continuously to ensure the process remains productive. Constant attentiveness is necessary as nothing stays the same for long.

If you use the guidelines in this article to think about and evaluate your meetings you may learn something that helps you make improvements. You may already understand everything in this article, but you may notice that something is slipping. This might provide an opportunity to reflect and gain important insights into what is happening with individuals, meetings, teams, and the organization. What happens in and around a meeting, verbal and non-verbal communication is a useful source of information.

An effective meeting will be continuously challenged to stay so. This is partly because an effective meeting becomes a safe space, and it is a human need to test the boundaries of safety and authority periodically. Paradoxically, this push and pull at the boundaries can help maintain safety and keep things on track. We must keep paying attention to what is happening. So, the signposts in this article are a helpful checklist to help notice what is happening, what needs thinking about and attending to, and how to maintain effective meetings over time.

ORGANIZATION AND MEETING DYNAMICS
It is important to be aware of the wider cultural context that the meeting takes place in as well as the cultural differences of the attendees. This can make a big difference to some of the issues regarding the way meetings are conducted, protocols, and etiquette. Cultural sensitivity is important to help all meeting attendees feel included and to avoid misunderstandings due to cultural differences. What happens in a meeting may reflect the organizational culture in which it takes place, and it may influence the culture. The meeting process and dynamics can provide insights into the wider state of the organization. Therefore, paying attention to the nature of a meeting provides an opportunity for learning and growth. The opportunity is to provide a high standard that will strengthen the meeting and organizational culture.

In Marquet's example about punctuality being potentially related to issues of discipline, organization, and authority outside of the meeting, he was talking as the captain of a nuclear submarine. In that context, inadequacies in culture and leadership can have life-and-death consequences. While the consequences may not be so severe in most organizations, the conduct of meetings is relevant to organizational performance, and workforce well-being in all areas, from financial to physical and mental health.

Numerous factors other than the format contribute to a productive meeting. For instance, the skills of the people involved. However, a good format certainly helps, and a poor one will not. A lack of clarity in aspects of the process may lead to a counterproductive meeting. An appropriate format can help contain potentially difficult meetings. It may enable challenging issues to be worked on productively. It may also provide a model of working together that will have benefits outside of the meeting. It is an opportunity to provide a model of how,

- meetings and relationships are managed.
- authority is exercised.
- core values are held and reflected in the work.
- boundaries are established and maintained.
- communication is facilitated.
- differences can be helpful.
- decisions are made.
- people are included.
- contributions are valued.
- understanding is achieved.
- anxieties and uncertainty are contained and understood.

Other points could be added. In many ways, a meeting is a microcosm of the wider organization. Whatever the organization's espoused values and standards are, what happens in a meeting, for example, will often tell you more about where things are at and 'how things are done around here'. In other words, the way a meeting is conducted is a model of the organizational culture. Obholzer, p.134) summarizes,

> Having a specific time set aside on a regular basis to meet with staff in relation to their work roles is essential. If this is respected by both sides, it opens successful channels of communication. But here, too, there are pitfalls. Constant interruption, taking telephone calls, looking at the computer screen rather than the individual concerned, reading and sending texts, all give a clear message: 'I cannot really be bothered to give you my full attention'. Behaving in this manner encourages others to do the same: 'if the boss can behave in this way, then it must also be acceptable for me'. This creates a climate of pseudo-attention and pseudo-communication that is likely to 'infect' the entire organization. What is not a good model for family and couple communication is certainly not a good model in institutional practice.

The purpose of all planned meetings is to achieve desired objectives. This is most likely to happen when people collaborate creatively together. Creative collaboration is a playful process. Friedman (1999, p.64) states,

> Broadening the perspective, the relationship between anxiety and seriousness is so predictable that the absence of playfulness in any institution is almost always a clue to the degree of its emotional regression.

Effective collaboration and exploration do not usually happen unless tasks, boundaries, roles, and responsibilities are clear. As well as the task and boundaries of the meeting needing to be clear, attendees must also understand the boundaries of their roles and responsibilities. If attendees are unclear about who is responsible for what there is little chance of a productive meeting. The outcomes may add to the existing confusion.

Change and Resistance
One of the reasons that meeting dynamics can become fraught is because of what is involved in the process of decision-making. A decision potentially means change. And few changes do not also involve a sense of ambivalence, uncertainty, loss, and even fear. Therefore, whether acknowledged openly or not, resistance comes into play. When resistance is perceived as a problem those who express concerns tend to be labelled as 'negative'. Dr. Linda Hoyle (2004) describes this very well in her excellent chapter, 'From Sycophant to Saboteur: Responses to Organizational Change'.

We can think of an organization as having both a technical and a social system, sometimes referred to as a socio-technical system (Trist, et al., 1963). We go to work to perform and carry out a job using the technology in the way it is made available. As soon as we join the workforce, we become part of a social system that also influences how we carry out our work. How these two elements are integrated will determine how well the organization's task is carried out. The technical and social systems ideally match together with positive results. However, sometimes the social aspect may be used as a way of avoiding the work task. And sometimes the way the task is carried out and the way technology is used can be dehumanizing. Production line systems, for example, are at risk of that. Important human and social needs may be overlooked. Such as companionship, belonging as part of a group, being valued, mattering, and having some control. Therefore, any change in the technological system will also have an impact on the social system.

The social system at work is also used consciously and unconsciously as a defence against anxiety (Menzies Lyth, 1959, 1961, 1970). Sometimes this is helpful to the task and sometimes it becomes a form of denial and being out of touch with the task. Unless people at work are in a state of psychological pain or suffering, any change to the work system, which is also a change to the social system, is likely to be met with resistance, if not outright fear.

The more significant the meaning of the change at a personal level the greater the resistance is likely to be. For example, in a meeting of senior managers, an organizational restructuring has been put on the agenda. In theory, it sounds like it could be good for the organization to remove a layer of management. But very quickly the people in the meeting are thinking what this might mean to me and my role. The realization that the changes might include demotion for some and redundancy for others casts a different light on the situation. The proposal also suggests a wider possibility that the organization is in financial difficulty. The task issue has quickly become personal and social with consideration of who might be lost or moved to a different role and team. Some of the people in the meeting see an opportunity for themselves, so another dynamic comes into play – who are going to be the 'winners and losers'? This triggers another layer of feelings into the dynamic, such as envy and rivalry.
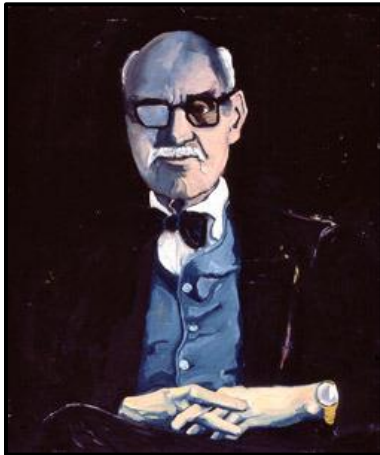
Wilfred Bion (1962) had a groundbreaking and lasting influence on the understanding of these dynamics. As well as being a psychoanalyst, he has been described as an organization change leader. Bion conceptualized how the task and social aspects of organizations can combine productively or defensively. He used the term 'work group' to mean the group carrying out its prescribed task. He also made it clear that at the same time, the group must also meet its member's social needs appropriately. For example, needs such as to feel connected, to be supported to do the work effectively, and to have anxieties contained. Occupations today often carry significant anxieties and risks. People also bring their anxieties, such as fear of failure, fear of being rejected, etc.

If the anxieties in the work group are not sufficiently contained, i.e., given attention, acknowledged, thought about, and made sense of, the group is likely to become overwhelmed. This is most likely when the issues involved in the task are highly emotive. A straightforward example would be a team of medics or firefighters whose work can be a matter of life and death, and who are highly depended upon. When the group begins to feel overwhelmed Bion argued it is likely to regress from a 'work group' to a 'basic assumption group', concerned with more basic matters such as survival and ridding itself of overwhelming anxiety. The group in this mode becomes defended against thinking about the work task. Bion believed that there are three types of basic assumptions, by which this usually happens – fight/flight, dependency, and pairing.

In the fight part of fight/flight, the group starts fighting amongst itself or finds an external enemy to galvanize itself against. In the flight part, the group may spend its time talking lightly, humorously, and even seriously about anything besides the task. People might be absent without warning and meetings may tend to be canceled. In dependency the group searches for a magical solution such as an omnipotent and protective leader. In the pairing dynamic, it is fantasized that two people may join to solve all the group's problems. These dynamics are only easy to spot by someone who can keep a perspective. It may be helpful to set a group expectation for members to keep an eye out for these dynamics and call them out at an early stage. Even if a dynamic going on may be ok, for example, a healthy disagreement, a moment to pause and consider is helpful.

If you are in a basic assumption dynamic, it can be extremely difficult to not get caught up. The dynamic is powerful. Disrupting the dynamic can be felt as a threat. Strong leadership can help to contain the anxieties and bring the group steadily back to task. By this, I mean the kind of leadership that can think about what is going on and help restore the group's ability to do the same. However, if the leader is anxiously trying to find solutions it may be a sign that the leader is caught up in the dependency role. While the basic assumption mentality may provide short-term relief, it does not solve problems and can make matters worse. For example, in-house fighting and attacking external partners can be damaging and costly. To get back on task the group must be able to think realistically about its work and challenges together.

Meetings in an organization are often a crucial part of the work and social systems. Significant changes are usually discussed and decided upon in a meeting. Resistance to change can be anticipated, including resistance to changing the meeting itself – such as rules about its frequency and attendance. This can be difficult for everyone in the meeting including the chair. Sometimes, it can also be difficult for those outside of the meeting as they may have invested or projected something onto the process. For example, 'we'll be alright because they meet every week and sort things out'. I heard of a study that found groups performed a task better if they were told that another group was thinking about them and their task (even though they were not).

All of this does not mean that we let resistance put us off change, as continuous adaptation is essential for survival and success. As Obholzer (p.50) explains,

> It must be remembered that an organization cannot stand still. Developments in the social and industrial environment make for constant change, and this, of course, makes for an altered climate in which the organization needs to operate.

However, we should respect the reason for resistance and provide time and space for changes to be discussed and considered. At a simple human level, Obholzer (p.136) acknowledges what is often the reality,

> While lip service is paid to the welcoming of new ideas, at an unconscious level the last thing on earth that both the remaining members and the organization itself want is change and potential disruption.

Anxiety and fear about change can be reduced as people begin to make sense of, digest, and feel part of the process. People tend to feel less fearful when they have some control. A lack of attention to this is, is a key reason so many change projects fail. Some research puts the failure rate as high as 70%.

Sycophants and Saboteurs
In her organizational research, Hoyle (2004) found that there is a continuum in response to a proposed change. Most people move up and down the continuum depending on the issue and what they make of it. Therefore, the majority of people are in a positive & challenging or negative & challenging position.

However, at the two ends of the continuum tend to be those who are completely in favor and those who are completely against. Those who are completely in favor are at risk of becoming entrenched, sycophantic, head-nodding, yes people. Often, they are not so much in favor of anything except pleasing whoever they feel is most powerful. Those who are completely against are at risk of becoming entrenched, anti-change saboteurs. Anyone who regularly takes this position may either be in a constant state of hopelessness or stuck in the habit of resisting anything new.
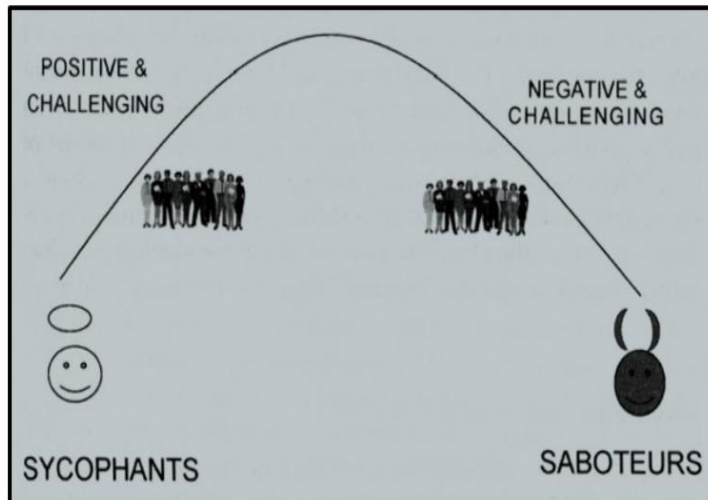
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As this diagram shows, the entrenched people at either end are in a small minority.

People who constantly remain in either the sycophant or saboteur position do not offer any constructive value. They tend to be non-thinking and stuck in their response.

The danger is that if the sycophants or saboteurs are allowed to become powerful, they can persuade the positive & challenging or negative & challenging individuals to join them in a non-thinking, anxious state of mind.

If there is a culture within a meeting or any decision-making context to welcome concerns, and views on both sides, a more realistic and helpful outcome may be achieved. For example, a person who is not in favor of a decision offers a crucial bit of advice that helps make it work. If on the other hand, objections and concerns are unwelcome and labeled as negative, those towards this end of the spectrum are likely to become more defensive, resistant, and entrenched. They might even campaign vigorously to pull people in against the change. When this happens in a covert way a subculture is developing. This can be what leads to a polarized organization with two sides fighting against each other.
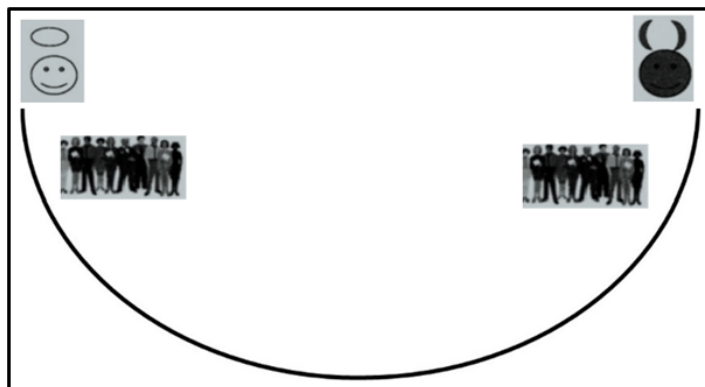

The organization may then begin to look more like this with most people now moving towards the extremes of sycophant and saboteur. In this split organization, all issues are felt to be a matter of winning or losing, being in or out, favored or rejected. While these dynamics and anxieties become central in a culture that has become polarized, to some extent they are always present.

This dynamic was also described by Marris (1986) who,

> … suggests that in organizations the internal conflict evoked by ambivalence is often externalised and may get played out between individuals or sub-groups. 'Tribes' form – those in favour and those opposing the change process – relieving psychic tension, reducing confusion, and bolstering a sense of identity and belonging, now defined in terms of being 'for' or 'against' the change process. This is a familiar picture. Where grief is suppressed rather than externalised, there may be withdrawal and apathy instead of a fight, or a long, drawn-out low-grade rumbling often called 'resistance'. Denigration of the past by the 'pro-

change tribe' can lead to others feeling too alienated to engage with the new organization.
(in, Krantz and Trainor (2019, p.207)

Hoyle (2004) noticed a significant individual difference in the people who stayed entrenched in a sycophant or saboteur position. Her experience was that those in these entrenched positions tended to have a lower personal capacity to tolerate any type of change to their state of mind, as illustrated in this diagram.

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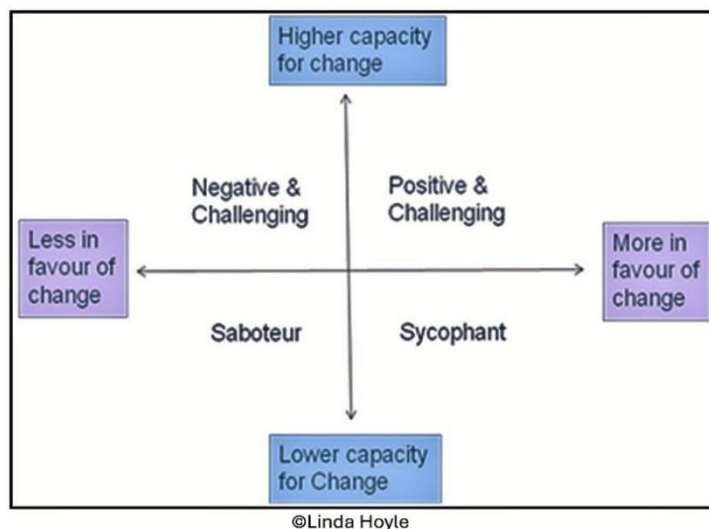
In contrast, individuals who had a higher personal capacity to change their state of mind were more likely to remain in an engaging and receptive position. These people would tend to hold a negative & challenging or positive & challenging position.

This subtle difference is important for leaders of change to understand. It would be easy to perceive any kind of challenge from employees as unhelpful and respond by defensively ignoring it. Whereas, if leaders are aware that the majority of challenging responses may be constructive and important to listen to, it becomes a virtue rather than a difficulty.

Hoyle also found that a fundamental source of resistance for many people was that the proposed change was going to take away something that gave meaning and purpose to them in their roles. In many cases, the change caused existential anxiety for employees, particularly if they had a long career in the role. She advocates that change leaders may benefit from considering what aspect of the proposed change may take away the purpose and meaning that the work has for employees.

Decision-Making, Authority, Consensus, Groupthink, and Voting
Decision-making processes can feel competitive and raise issues of power, dependency, and autonomy. There will always be ambivalence about a leader who has the power to decide and who has the casting vote. On the one hand, it can be a relief that someone is in charge and creates a feeling of safety. On the other hand, it can evoke strong feelings such as envy and hatred. A leader must strive to do what is right in terms of the task rather than avoid strong negative feelings or seek admiration, praise, love, etc.
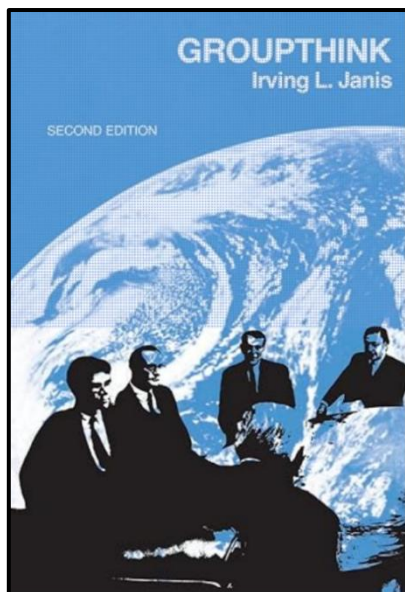
Talking about decision-making and the voting process, the investor Randy Komisar (2016) says that his team's approach is not a majority vote rule. It is more like a set of opinions. Discussion takes place and even if most partners (group members) disagree the decision to proceed may go ahead. He states,

What we find is our best investments usually come in very close calls or significant conflicts amongst the partners. If all the partners agree, yes or no it is usually not a good decision.

Komisar explains how decisions are made,

- The partner who has put the proposal on the agenda is expected to present it and identify the pluses and minuses, the risks, and questions.
- The other partners (meeting attendees) are expected to do the same.
- Then a vote takes place. If everyone agrees or disagrees with the proposal, Komisar says this usually means there is not enough consideration, and it is a bad decision.
- The decision is not based on the majority vote but on the final decision of the chair. This means that the chair must be highly competent in understanding the technical matters involved and able to manage the social aspect of the meeting dynamics. This type of chair is a well-differentiated leader who is more able to stay connected and separate, and less influenced by the sway of groupthink (Janis, 1982, Friedman, 1999).
- Sometimes the chair may go against the opinion of everyone else. While this process is not based on consensus it is inclusive and consultative. This means that individual responsibility must be taken.

It seems a good idea that the person leading the proposal is expected to consider its weaknesses as well as strengths. The discussion is about getting all relevant opinions and information into the open. This is more about the reality of the issue than the personal dynamics of being right or wrong. What can happen in a less healthy discussion is that those mainly in favor argue all the positive reasons for change and those mainly against argue all the negative. The process becomes more competitive based on persuading others to vote for or against. This encourages people to take a blinkered view that shuts out some of the risks or potential. We know the value of the lone voice – the voice that is 'outside of the box' or sees 'the elephant in the room' that no one dares mention. If this voice and opinion knows it will be outvoted it is much less likely to be expressed.

There is plenty of research on the dynamics of consensus and its limitations. This can seem counterintuitive as we might expect that if capable minds are examining the 'evidence' a majority would be more likely to indicate the right decision. But we know about the power of 'groupthink' and the human need to fit in. The use of the word fiasco in the full title of Janis's groundbreaking book gives a clue as to the potentially negative outcomes,

"Groupthink: Psychological Studies of Policy Decisions and Fiascoes."

We also know about management by committee and how it can lead to more extreme decisions. Where the decision is by a majority vote, people are more willing to agree to things that they would not personally stand up for or take the risk of. Another knock-on effect of this is that a

matter may not be examined thoroughly as the consequences will not rest on anyone's shoulders. Muir (2018) outlines key problems in consensus as,

- Diffusion of Responsibility.
- Ignoring the Lone Voice.
- Social Pressure.
- Competition.
- Stress (sometimes consensus processes become gripped by stress as no one will take responsibility).

However, some situations may require a consensus-based voting system. If this is done well and avoids the pitfalls described above the outcomes can be positive (e.g., see, Seeds of Change, 2020). The key thing is to consider the nature of whatever decision-making process is put in place and how well it fits with the task of the meeting, its wider context, and the culture it sits within. Even if a decision is not being made the potential issues of rivalry and competitiveness are never far away from the surface. For example, who is being listened to and favored the most? Whose views are less accepted and met less enthusiastically? The chair of the meeting must be attuned to these dynamics and their part in them. Chairs will also have a personal stake in what is going on and may fall into collusion with sycophants or saboteurs. As Obholzer (p.55) argues,

> The chances of such dynamics occurring, for example, in a work meeting of all employees, are obviously lessened if the task of the meeting is clearly stated, and the meeting is managed both concretely and psychologically to perform a clearly related work task.

The chair's role and interests outside of the meeting can compromise an impartial chairing of the meeting. This may require a disentangling of the two roles. This can be made explicit, for example, by saying, "In my role as chair I think this, or in my role of …. I think this" (Obholzer, p.105).

Change and Loss, Uncertainty, and Safety
Usually, good news that is advantageous is not resisted. But it is more usual for there to be some ambivalence. The phrase, 'Be careful what you wish for', captures this well. As does the saying, 'It's an ill wind that blows no good'. Resistance will always be strongest in the decision-making process when the potential change is especially significant. Isabel Menzies Lyth (1961, p.105) states,

"Making decisions is always stressful because it implies making a choice and committing oneself to a course of action without full knowledge of the outcome." She adds that decision-making is especially difficult when the consequences are relevant to the well-being of others. All significant change includes loss – a loss of people, relationships, and situations.

Hoyle (2015) lists the following, sources of resistance to change,

\#   Change evokes uncertainty and anxiety in individuals, groups, and organizations.

\#   Change may lead to a real loss of jobs, which evokes performance and survival anxiety.

\#   Change threatens to take away the social system that is used as a defence against anxiety.

\#   Change threatens to take away the meaning that work has for individuals, which leads to existential anxiety.

Some decisions and proposed changes on the meeting agenda may not be especially contentious. However, anything that may have a significant impact such as outlined above will cause anxiety. Even when a proposed change appears to be promising, we are entering the unknown and there is uncertainty. Each of us has our ways of dealing with uncertainty and so do organizations. The aim is not to get rid of uncertainty but to make it manageable, and even productive. When we are not competent at managing uncertainty, anxieties related to change can lead to an avoidance of making difficult decisions. As Menzies Lyth explains (1961, p.105),

> Decisions are checked and counterchecked, as are the executive actions consequent on them.

This can often be found in bureaucratic cultures where a meeting may not have any authority to make decisions, only to make recommendations that must be referred to another meeting. While this can be helpful in some instances there is also a risk of not allowing people to hold appropriate authority and responsibility, which in turn undermines growth opportunities. We can never guarantee that a decision will turn out to be right. If we could, it would not be a decision as there would only be one option (Menzies Lyth, 1970, p.54-55). If the decision does not work, we can learn and decide our next course of action. What happens after a decision can be as equally as important as the decision itself. A 'good' decision can go wrong, and a 'bad' decision can go right depending on what happens and what we do after the decision (Friedman, 1999).

Marris (1974) in his book 'Loss and Change' argues, that we have both conservative and progressive impulses. The conservative impulse is to stick to what is familiar and safe and the progressive to explore and discover new possibilities. We need both for our survival. Too much conservatism and we stagnate, too much progression and we move too quickly and take too many risks. Peter Senge (1990) the American Systems Scientist stated,

> Virtually all natural systems, from ecosystems to animals to organizations, have intrinsically optimal rates of growth. The optimal rate is far less than the fastest possible growth. When growth becomes excessive—as it does in cancer—the system itself will seek to compensate by slowing down; perhaps putting the organization's survival at risk in the process.

The chair of a meeting must gauge how much change can be managed and processed by the group. This is especially so when the group is also a team or has a key management and leadership function in the organization. Fears of risk, uncertainty, and loss need to be understood. These kinds of difficulties need time to process just as in mourning following a loss. There are stages to be worked through. For instance, as outlined by Kübler-Ross (1969),

- Denial

- Anger
- Bargaining
- Depression
- Acceptance

Kübler-Ross was referring specifically to the issues involved in bereavement. Not all change will necessarily involve all these responses. However, it can be expected that any significant organizational change will evoke strong and similar feelings. People are better able to move through the stages if time is given to acknowledge and talk about the feelings involved in the process. An important part of this is to pay attention to what the change means individually and collectively. We know that humans are meaning-making creatures. Our identities are made of the meaning we attribute to our lives. As Marris (p.147) states,

> … loss disrupts our ability to find meaning in experience… grief represents the struggle to retrieve this sense of meaning when circumstances have bewildered or betrayed it.

We tend to progress well when we have continuity of meaning. A crisis such as a significant bereavement and organizational change can disrupt our continuity of meaning. If we can maintain the capacity to think about loss, as with change there is the opportunity for growth and development. An ending is also a beginning (T.S. Eliot, 1943),

> What we call the beginning is often the end.
> And to make an end is to make a beginning.
> The end is where we start from.

When we are faced with a significant ending and beginning, we must re-evaluate what the change means to our lives in the present, the future, and the past. This process of mourning and the sense we make of it helps us achieve a continuity of meaning and identity. In personal and work life a big change may lead us to question the value of what has gone before. Does the new change mean that what went before was no good or thrown into doubt? A common response to a change can be, 'It's like you are saying everything we have been doing is rubbish'. Change can feel personal, negative, and judgemental.

On the other hand, if we see the past as a journey of ongoing development, we might be more accepting of change. For example, it could be framed like, 'We can't carry on like that anymore. Things have changed and we think there is a better way of doing things now. But it is only because of our previous efforts that we can move forward to the next level.' This is akin to an evolutionary rather than a revolutionary process, or a first-order change within the system. A more radical second-order change to the system itself tends to be more difficult. Changes to the system are also more likely to be irreversible. The second-order change can be especially difficult for someone who has had a lead role in the previous ways of doing things. If you've built something it can be very hard to see it dismantled. This is one reason why some organizations take the view that if a
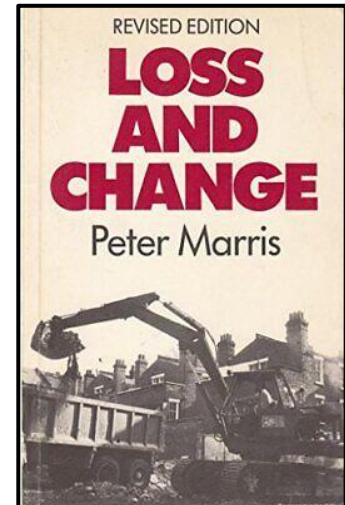
leader is in post for too long, ten years or more, they become more invested in the past rather than the future.

Hoyle (2015) refers to a transitional space to allow the challenging issues of change to be worked on. This space could be part of the meeting agenda, or it could be set up as a specific meeting to help process major changes. Hoyle suggests the following guiding principles,

Authorised, legitimate, and formal.
Sanctioned by the rest of the system.
Set aside space and time.
Developmental space with no repercussions.
Toleration of different opinions and deviation from the norm - containment.
Evolutionary Creativity - holding both loss and gain.
Outcomes and learning must be integrated with business objectives.

It helps meeting chairs to be aware of these principles. However, as each situation is unique it cannot be prescribed exactly how to implement them. For instance, deciding how much time is needed to work on the change and evaluating progress is a matter of judgment. In terms of time, the length of the meeting time and the time between meetings are important. Also, how many days, weeks, or sometimes longer are needed to work on the proposed change? Being too fast or too slow can both evoke unhelpful anxiety.

Marris (1974) argued that people in a change process may project their ambivalence as a way of avoiding the complex feelings and issues involved. So, instead of being positive about the change but also uncertain, a person may act as if they are certain and project the uncertainty onto another person or group. So, the other holds the more negative anxious feelings. Or it could go the other way with positive feelings being projected onto 'the other' who are then perceived to be idealistic and unrealistic. Krantz and Trainor (p.207) explain,

> Much of the psychic pain of grieving has to do with ambivalence towards what has been lost. We tend either to idealise or to demonize the lost person or situation, rather than recognising that one has both positive and negative feeling towards them.

When a proposed change is responded to defensively, some of the relevant issues are split off. This is often an unconscious process to reduce the complexity and challenges, including loss. While defence mechanisms such as splitting and projection may temporarily make the situation more bearable, and seemingly straightforward, unless they are worked through, they will undermine the proposed change. A containing process such as well-run meetings can play a key role in this. If so, it is necessary not to censure views but to try and include a range of opinions and feelings so that everyone can own their ambivalence, hopes, and fears. Hoyle's (2015) point about a 'developmental space with no repercussions' is helpful. The aim is to enable people to say what they think and not worry so much about what or who is right or wrong. The fear of saying the wrong thing is likely to hinder the quality of thinking. For example, someone may simply not like what is being proposed. Unless that viewpoint is acknowledged and worked on, we can be sure

that the implementation will not be carried out with the confidence and commitment that is needed.

> Any army is like a horse, in that it reflects the temper and the spirit of its rider. If there is an uneasiness and an uncertainty, it transmits itself through the reins, and the horse feels uneasy and uncertain. (Thomason, 1941)

Safe Uncertainty

A plan of action may be agreed upon but if insufficient attention has been given to the issues and feelings involved the implementation will be entered into with a sense of 'uneasiness and uncertainty'. Rich Diviney (Navy SEAL) states (2021, p.36)

> The hard truth is that education takes more than time and effort—it often involves a willingness to dive into uncertainty.

Uncertainty and fear are reduced when we have a secure, safe base. The exploratory quality of the progressive impulse is supported by degrees of safety. The feeling of safety and security can come from within oneself, the context of one's life, family, etc., and from the work environment. The nature of life and work is uncertain so those elements that are predictable and reliable help us manage uncertainty, explore, and make changes. Mason (1993) created the concept of 'safe uncertainty'. In every situation, there are possibilities of safety and unsafety, and certainty and uncertainty. This gives us the 4 operating domains that Mason described in this diagram.
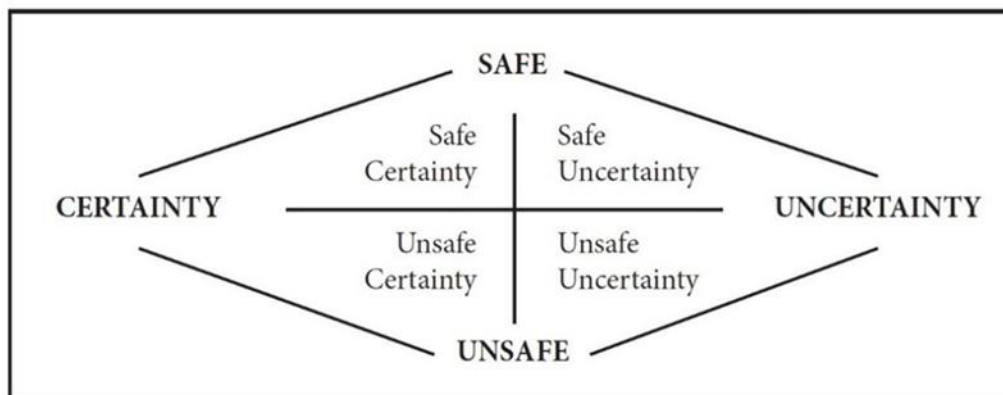
If we think of the 4 positions in the quadrant,
1. Safe certainty has the risk of becoming stagnant, of being too comfortable.
2. Unsafe certainty is like sticking rigidly to a plan where the consequences appear to be dangerous.
3. Unsafe uncertainty is like being overwhelmed by fear in the face of a threat.
4. Safe uncertainty allows for the exploration of possibilities and adaptation. As Mason explains, it encourages curiosity and enables authoritative doubt.

Safe Uncertainty is the most functional and healthy position to be in and what we should aim to move towards. More recently the concept of 'psychological safety' (Edmondson, 2019) and 'team

psychological safety' (Delizona, 2017) has much in common with this. As far back as 1756, Edmund Burke, the Anglo-Irish statesman and philosopher, said,

No passion so effectively robs the mind of all its powers as fear.

We can never be completely safe from threat but by building reliable, trustworthy relationships and environments with elements of stable predictability we can help people to feel safer. If we do the basics reliably, such as starting and ending a meeting on time, and the other details described in this article – then we are free to think about the more challenging and complex issues. It could also be argued that not doing the basics reliably is one way of avoiding the more important and difficult work. The role of a meeting chair is critical to achieving an appropriate level of safety and maintaining it. Kim et al. (2020, p.2) states,

Psychological safety is "a condition in which one feels (a) included, (b) safe to learn, (c) safe to contribute, and (d) safe to challenge the status quo, without fear of being embarrassed, marginalized or punished in some way. (Clark, 2019)

These are all vitally important qualities to have in meetings and team performance. Values such as trust, inclusiveness, and respect help strengthen psychological safety, which enables people to take risks, manage uncertainty, and be creative. Kim et al. (2020, p.2) summarize,

"Project Aristotle", which explored over 250 team-level variables, found that successful Google teams have five elements in common: psychological safety, dependability, structure and clarity, meaning, and impact of work (Google, 2015). The findings argue that psychological safety is the most critical factor and a prerequisite to enabling the other four elements.

**Collaboration, Creativity, Curiosity, and Play**
The above sections refer to the more difficult side of work in meetings and work in general. The other side of the coin is qualities such as collaboration, creativity, and curiosity. These qualities are playful and tend to be enjoyed. Working on both sides is necessary to establish a healthy work culture. For example, if resistance and rivalry are worked on, playfulness and collaboration might come to the fore. Sometimes playfulness and humour may be the best way of working through a tense difficulty. As Friedman (1999, p.67) said about leadership,

Playfulness can get you out of a rut more successfully than seriousness.

Too much of anything might be unhelpful. Unbounded curiosity might be dangerous. Unbounded collaboration might lead to collusion and the denial of difference. It might even lead to a merged, undifferentiated state, where people lose their individuality and speak for each other. In one organization I worked in, we sometimes wondered if we were getting on too well in our senior team meetings. There is a danger that disagreeing or having a row is always seen as a 'bad' thing to be avoided. This was especially so when the fighting and discord were going on everywhere else in the organization but not in our meeting. Maybe our tensions and conflicts as a senior team

were being avoided, projected, and acted out by others - providing us with a distraction from looking at ourselves and our challenges.

Collaboration, creativity, curiosity, and play are facilitated by a safe environment, where mutual trust and confidence develop. This, in turn, requires structure, predictability, and clarity. These conditions promote curiosity, which is the essence of play and exploration - the qualities that underpin discovery and achievement. This is true whether we are talking about the discoveries of an infant who explores from the safety of a mother's secure base or those of the great explorers in 'the age of discovery'. Clifford-Poston (2001, p.89) when talking about what a child needs to learn, simply says, "A secure base from which to enter into the world and the permission to be curious."
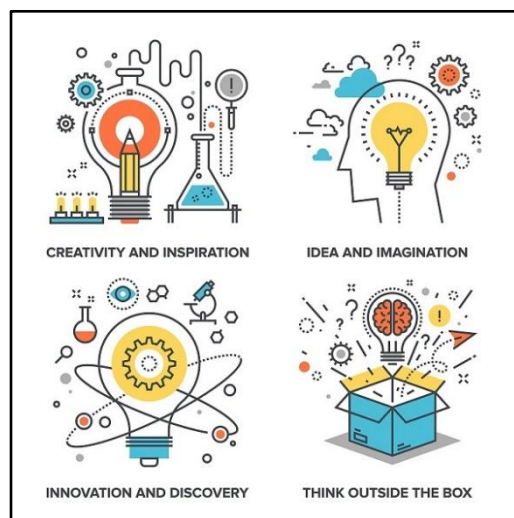
The same can be said about the world of work and what happens in meetings. If a meeting is not a place for potential learning, where something new might emerge, information may as well just be sent by email, for example. To maximize the time and effort invested in a meeting process this article outlines the basic requirements. In many types of meetings, skill is needed to manage the complex dynamics involved in the group. A good meeting has a balance, and the role of the chair is to help facilitate a helpful and productive one. The chair needs to monitor how the meeting is working. Everyone can also be expected to consider this. There could be a quarterly review for example. The simple question might be, 'How well do we think this meeting is helping us in our work and are there any ways we could do it better? Whoever the chair reports to outside of the meeting also needs to be part of the review process. Considering how we are working together could also be a feature of the meeting process. For example, with observations like, we seem to be struggling today, I wonder why? etc.

Continuing with the theme of resistance, review also means feedback, which can be challenging. While the feedback may be about the meeting, it might also feel as if it is about oneself, especially the chair. In any feedback situation we may be faced with something about ourselves we would rather not see. So, we must work hard at being open to and giving constructive feedback. This may mean change rather than maintaining the status quo. As Obholzer (p.15) explains,

> Getting feedback about oneself is an uncomfortable process. Ostensibly we all embrace and welcome feedback – the proviso is, however, that the feedback which is most welcome is the feedback that confirms our self-image. It is, therefore, not surprising that those in power frequently surround themselves with acolytes who shield them from reality.

A good yardstick for how open we are is how we respond to mistakes. In a defensive culture, mistakes are associated with blame, criticism, and even persecution. In a more open culture mistakes are seen as an opportunity for learning. Fear of making mistakes can seriously inhibit progress and development.

CLARITY OF PURPOSE – TASK DEFINITION

Having a clearly defined task is essential for any formal meeting. Without it, the meeting will have little chance of dealing with the complex and often challenging issues involved. The task definition is the benchmark from which it can be considered if the meeting is on task or not. If a meeting is going to take place everyone must know what the purpose and desired outcomes are.

It sounds obvious but it is surprising how often the purpose of a meeting gets lost or confused over time or was never clear to begin with. This is understandable as a meeting may easily slide off-task for the reasons discussed. A meeting may even become a refuge and escape from work, rather than a place where difficult matters can be thought about. Sometimes it is appropriate for the meeting chair to have the role of defining the meeting task. Other times, the task must be defined or approved by the organization's leadership outside of the meeting. It should be possible to define the meeting task in one sentence. For example, for an organizational consultation meeting, Obholzer (p.118) suggests the task might be to consider,

> 'What is going on here, is it relevant to our work and our organization's future, and what are we going to do about it?'

If the meeting has an agenda sheet, the definition of the task could be placed at the top of the page as a reminder. Often organizations are prone to developing one new meeting after another but not giving up existing ones. A new kind of meeting is sparked by an innovative idea, but the existing meetings which were also sparked by innovative ideas can be hard to let go of. So, a situation develops where people spend increasing amounts of time in meetings and complain that they cannot get the 'real' work done. For example, Perlow et al. (2017) claim that senior executives in the USA now spend double the time in meetings compared with the 1960s. Being clear about the task helps to evaluate if a proposed new meeting has been formulated clearly or not, including all the details of time, attendance, etc. (See Appendix). It can also help evaluate if a current meeting has served its purpose and is no longer needed.

Case Example

One organization I was working in had this problem. People were increasingly complaining that they did not have enough time for their core tasks as too much time was spent in meetings. After much discussion without much progress, it was taken to the monthly organizational consultancy meeting. It was then agreed that all the chairs of the various meetings would review their meetings. They were to report back if the meeting was necessary to continue or not. If it were to continue, could the frequency be reduced? The chairs all reported back that their meetings should continue with the same frequency. When discussed at the next consultancy meeting, the consultant suggested that each chair go back to their meetings and come back with a clear definition of the meeting's purpose. He suggested that any meeting that could not define its purpose in one or two clear sentences, should have a trial period of stopping and seeing what happens. Following this, one meeting stopped and others became fortnightly rather than weekly. Once this happened there were no untoward consequences. Time was freed up and the pressure on the schedule reduced – much to the benefit of the organization's primary task. As said, the

purpose of any meeting should be defined in 1-2 clear sentences. The desired outcome(s) should also be included in this definition. Another example might be,

> A meeting to consider and plan all aspects of the team's work, to improve performance and positive outcomes for customers.

Periodically the meeting should review whether the purpose continues to be relevant. If not, either make the necessary adaptation or discontinue the meeting. Meetings should be for discussing significant matters that need to be done in person. Also, as we have learned, some meetings can work well online - saving time and expense of travel.

THE ROLE OF THE CHAIR
Clarity on this is vital to help ensure an effective planned meeting. A suitable chair for a meeting will usually be determined by the meeting's task. For example, in some meetings, a chair may be the line manager of the attendees. In others, it may be a peer or someone who does not work with the attendees directly. In some meetings, the chair is permanent, such as when it is the line manager of attendees. In others, the role may be time-limited, such as a Board meeting. In cases, such as a peer-group meeting, it may revolve around each attendee taking a turn.

Whatever the type of meeting, the chair always has a key role. The vital role is to keep the meeting on task according to the parameters that have been set. As explained earlier, as well as the conscious explicit purpose of the meeting there are less transparent and unconscious dynamics involved. As discussed, if these dynamics are not managed well, they tend to take the process off task. Obholzer (p.53) states,

> If the meeting is well managed as regards task, boundaries, and time, chances are that there will only be minimal interference in its work by the presence of unconscious processes. The more the meeting runs in a laissez-faire or sloppy mode, the more are unconscious processes likely to make their appearance and interfere with the required work.

Therefore, it is important to be clear about the meeting parameters and the chair's role. The following are appropriate responsibilities for the meeting chair,

1. Ensure that attendees understand the task of the meeting. This can be discussed in the meeting, allowing questions for clarification. The task may seem clear, but people's interpretation of it may vary. The chair will need to be clear of their responsibilities and authority - related to the meeting itself and each attendee. An unclear definition of the meeting's task with unclear authority is a recipe for disaster. A central issue is the nature of decision-making authority. Some meetings have the authority to make decisions, and some do not. Meetings that do have it need to understand the limits of their authority.

2. Be clear about who must attend. Usually, the expected attendance is clear and self-evident. For example, usually, all team members attend a team meeting. However, in a meeting such as a project group, it may be necessary to decide who should be invited to attend. A good rule of thumb is to invite as few people as possible but not exclude anyone whose role and perspective

would be important to the success of the project. Also, consider the lines of reporting outside of the meeting. If the project is significant to the whole organization are there any parts or departments that are not represented? In any change project, resistance is more common when people feel excluded and have no say in the process.

Once the attendees are agreed upon, it is important to set expectations about attendance and absence. Is attendance mandatory? It also helps to have rules about absence or partial attendance. Requests for such should be discussed with the chair in advance of the meeting. Sometimes the chair may have the authority to agree or not with the request. For instance, if the chair is also the line manager of attendees, he/she may decide whether to prioritize attendance at the meeting or if the meeting can be missed to get on with other tasks. It is not helpful when people are absent without an explanation, or request during the meeting to leave early. As with most things, anticipation and planning are always preferable. There are always exceptions where advance notice is not possible.

Another question that is important to clarify is whether someone else can represent an absent person at the meeting. For example, can a deputy manager attend on behalf of a manager? In some meetings, it may be helpful to have this option, while in others it may be inappropriate. Having a changing meeting membership can make it hard to maintain a sense of continuity. This tends not to work well in meetings with significant responsibilities. Not having to think about who will be present or absent enables people to focus better on the task, build relationships, and understand each other.

3. Managing the time boundaries of the meeting. How frequent is the meeting? What time does it start and finish? Where does it take place? Sometimes these boundaries are established by organization policy and the chair's role is to manage those expectations. The actual length and frequency of the meeting are principal issues. Does a meeting need 30 minutes, an hour, or longer? One consideration may be to do with the time needed for in-depth discussion and processing of complex issues. In my first job, some meetings were for half an hour and could be very helpful (see, Bregman, 2016). Now, similar types of meetings I come across always tend to be for an hour. Does an hour just become a habit? The time allocated will tend to be used, whether it is needed or not. If many people are involved, are we making the best use of time? With frequency, there can be too much of a gap between meetings, so the thread and sense of continuity are lost, or too little of a gap, and not much gets done or changes in between. The balance is important and Obholzer (p.125) reminds us that,

> … what happens *between* formal sessions is at least as important as what happens in the sessions themselves. This time provides the space to think about matters raised and to see whether ideas considered in the sessions are relevant to everyday life. Perhaps most importantly, do they offer a more constructive way for life and work?

Once the time boundaries are clear, during the meeting the chair may allocate someone the role of timekeeper. This person can remind attendees if the meeting is over-extending the agenda. It may be decided to allocate a certain time for each agenda item. Having someone in addition to the chair monitoring the time can help to keep the meeting on-task. Someone I worked with

introduced this idea to me, and I was surprised by how much difference it made. Especially to be given a prompt if an agenda item was possibly going on too long and when we were close to the end of the meeting. The chair may decide to ask the meeting if they would rather continue one item and carry over others. There are many judgments to be made by the chair during a meeting.

Whatever the agreed frequency and length of time for a meeting, making it clear and holding the boundaries firmly is most likely to have positive benefits. People should not be going to a meeting unless it has purpose and consequences. Therefore, the content may be anticipated as challenging and anxiety-provoking. As discussed, the feelings involved can be difficult, stressful, and even distressing. I can identify with that from my years of attending and chairing meetings. Clarity of start and finish times, and general reliability, i.e., meetings not being regularly canceled or moved is important. This should help reduce anxiety and improve a feeling of security from which people can engage. As Obholzer (p.126) humorously puts it,

> From the perspective of the employee in the room, the clear time boundaries, as mentioned, give not only the assurance that one might escape relatively unscathed from the ordeal, but also the possibility that anything problematic could be left to the very end of the meeting, at which point one might make one's 'escape'.

Meetings at the same time, same frequency, and same day of the week become a routine that allows people to worry about the less predictable aspects of their work. The reliability of a well-run meeting process can provide an anchor that also enables people to be more effective outside of the meeting. Especially in work that involves significant risk and uncertainty, it helps to make whatever is within control, dependable, and easier to follow.

Punctuality

Talking about why it is important to be on time, or even better a few minutes early, Duckworth (2016, p.267) says,

> "It's about respect. It's about details. It's about excellence."

Setting a clear expectation about punctuality is important. It also needs to be clear what the expectation is if an attendee is late. It may be appropriate to say that once the meeting has started no one will join the meeting. The reason could be that given the nature of the meeting, it would be unhelpful to disrupt once the discussion has started. Or it may be that occasional lateness has become a regular occurrence and the boundary needs tightening.

As the reliability of meetings is key to their success, avoid cancellations and time changes as far as possible. Regular unplanned changes undermine confidence, safety, and trust. It may also give the impression that the meeting is not valued and therefore undermine its purpose. Give attendees as much advance notice as possible if a cancellation or change is needed.
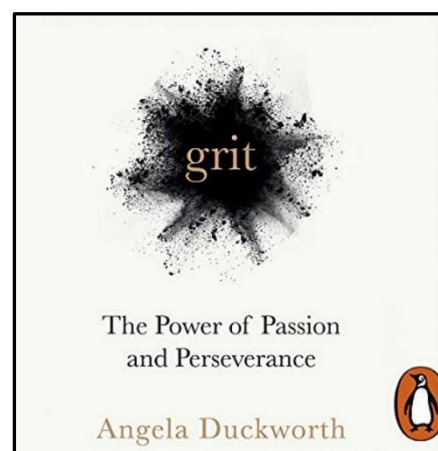
Case Example

I had this experience, where lateness was becoming a pattern, especially for one or two individuals. About 15 minutes into one meeting, I was chairing, I saw someone late on his way to the meeting. I paused the meeting and went outside to meet him for a minute. I said it would be unhelpful to join the meeting at this point and he could talk with me afterwards to discuss why he was late. The problem of lateness did not continue after that. As said, it is the matter of a pattern that is the issue and not being heavy-handed towards occasional lateness. In general, as lateness can be disruptive it is helpful to clarify how it is managed. As said, some organizations make the simple rule that you do not attend if you are not on time.

4. In-person and online meetings. The place of the meeting has become an important consideration, especially since the advent of online meetings. If everyone is expected to be present, consideration should be given to traveling time and the most suitable venue. See the Appendix for guidelines about the meeting room and venue. Some meetings may be held entirely online, and some may be a hybrid of online and in-person. Careful consideration must be given to ensure that the meeting arrangement is effective and suitable for its purpose. Post-pandemic, some organizations have returned to in-person meetings, and some have continued online. It does not have to be fixed. A degree of experimentation may be needed to know what works best.

Recently, someone remarked to me about the difficulty in the way an online meeting can end. The ending can seem abrupt with more anxiety about what might be left hanging over. In an in-person meeting, there is a transition out of the meeting, which sometimes includes informal chat, grabbing a drink together, etc. There is an opportunity to read feelings and dynamics and make subtle interventions. Therefore, if meetings are to be held online, especially group meetings, it will be helpful to consider any rituals that may help. For example, in the last 5 minutes, it could be asked if anyone would like to say anything or touch base after the meeting.

5. Establishing the meeting ground rules. For example, rules on confidentiality – what can and cannot be discussed in the meeting and outside of it about the meeting? In some circumstances, this may need to be made so clear that a breach of confidentiality could result in disciplinary action. Ensure that any rules of engagement are clear, such as being respectful. Values such as trust, fairness, and openness, are especially helpful in creating a positive collaborative culture (Jaques and Clement, 1991, p.xv). They continue (p.73),

> It is our values that move us, bind us together, push us apart, and generally make the world go round.

A meeting can be an ideal opportunity to reflect and model the core values of the organization. If the meeting is not taking place in a specific organization, it may still be helpful to establish core values that will underpin the meeting. One way of reminding everyone of the values is to have them written at the top of the meeting agenda. This can help to keep in mind whether the conduct of the meeting is in line with its values.

Details such as whether mobile phones are switched off are important. In general, to enable the engagement of people in the meeting it is best to limit any distractions. Phones can be switched

off and emergency contact with people in the meeting can be through a nominated person outside of it. It is also helpful to make this clear to the relevant people outside of the meeting.

Example
This is an example of clarity that incorporates points on time boundaries and rules. It is a simple directive that a Director I worked with put at the top of the agenda for meetings she chaired.

Meeting time: 9.15-10.30 am.
Note: All phones are to be switched off. Respect the start and finish times. Time will be allocated to agenda items. The meeting will finish at 10.30 whether the full agenda is covered or not.

That kind of clarity helps to provide a containing context where people do not have to worry about the basic expectations and can focus on the meeting content. Obholzer (p.105) goes as far as to say that,

> … a boundary-less, unstructured group open to disruption, with individuals reading their smartphones on their laps, or texting, or taking disruptive phone-calls, can result in only one thing: an anti-task meeting that can in no way draw upon the talents and expertise of the membership.

6. Setting the agenda. How to do this will depend on the type of meeting. Some meetings and discussions are business-like, and others are more exploratory. If there is no need for a formal agenda, as in more reflective processes, the task of the meeting should always be clear. Usually, an agenda should be completed and shared in advance. This helps attendees to prepare and not be taken by surprise in the meeting. It also helps everyone to feel included, valued, and listened to. However, there may be exceptions when something especially sensitive cannot be shared in advance.

A meeting may have a standing item on every agenda if it is something that must have continual attention. A good method for establishing the agenda is to send one out a few days in advance and ask attendees to add items. The content of an item should be clearly explained. The chair will determine which agenda items and in what order they are discussed. The proposed agenda items may need pruning. It is generally helpful to have the person's name against the agenda item. The person can then own and explain their reason for adding the item.

It is important to ensure that the agenda is realistic and achievable in the time available. Getting through the agenda well can be satisfying for everyone. Regularly failing to do so is frustrating. Prioritising is important and leaving off items or carrying them over is at the discretion of the chair.

7. Minute-taking and actions. Minutes are a requirement of most but not all meetings. As the chair needs to be paying attention to how the whole meeting is running it is unhelpful to also be the minute taker. This role can be taken in turn by the attendees or by someone whose role is specifically to do this. Usually, the most helpful minutes are those that show, wherever possible in a simple bullet point style,

- the agenda items discussed.
- any decisions made.
- any particularly significant points raised. For example, an attendee may wish for a concern or view to be noted for future reference.
- actions to be taken, by whom, and when.

It is important to follow up on agreed actions. At the beginning of the next meeting, a quick update can be given on the progress of actions from the last meeting. This can be continued until the action is signed off as complete.

As minutes represent a summary rather than a verbatim record there needs to be a process for agreeing on them. Sometimes the minutes can be read out at the end of the meeting for approval. Another straightforward process is for the minute taker to send the minutes to the chair first. The chair can agree with the minutes or make corrections. The minutes can then be sent to all attendees for agreement and comment. Once approved by the chair the minutes are then a formal meeting record. It is important to be clear about who the minutes are available to besides the attendees. Minutes may be a confidential record for attendees only and others may be shared with people outside of the meeting.

8. Preparation for the meeting. The meeting room and how it is organized is an important part of an effective meeting. Things that often indicate good preparation or lack of, include,

- A suitably sized room, enough chairs, etc. Being in a quiet enough space.
- Is everything fully accessible to all attendees?
- The right kind of table. As well as size the question of a round or rectangle table is worth considering. The positioning of people around a table gives a message about the meeting and the nature of relationships.
- Everything required is in place, such as a projector, a flipchart, etc.
- The room should be clean and well-presented. It is worth checking the room beforehand to make sure everything is in place.
- It is helpful to have a working accurate clock in the room.
- Other items, such as tissues, water, cups, and spare pens.
- Having a clear room booking system to prevent double bookings and allocating suitable rooms for each meeting.
- Ensuring the right number of copies of any paperwork required for the meeting, agendas, etc.

These may seem obvious and simple, but many meetings are delayed and distracted by not getting this right. As said, getting the details right provides a role model that may also improve the way things are done outside of the meeting. An essential part of preparation is what attendees do to be ready for the meeting with attention. A useful kind of attention includes being receptive to new ideas and possibilities. Any prior reading is done. Whenever possible required reading should be shared well in advance, so people arrive as prepared as possible. The chair should role model a

high quality of preparation. This also and most importantly means being mentally prepared, giving a sense of having time and space for the meeting.

9. Facilitating the discussion. The most skilled task of the chair is to facilitate a discussion that is inclusive and productive, within the time restraints of the meeting. There may be many moments where judgments need to be made. For example, when to allow silence for thinking, when to lead the discussion, when to prompt, when to cut short, when to extend, etc. In any group, there will be a time when someone is dominating a discussion and when another seems inhibited or quiet. A delicate skill of the chair is to dampen an overly dominant person and encourage others to give their views.

As discussed in the sections on the potential difficulties the role of the chair can be very demanding. It is a skilled task and one in which a chair will always be learning. One way of learning is to ask the meeting for feedback on how they have found the process.

10. Presence. The quality of presence provided by the chair is central to everything discussed so far. The chair of a meeting is in a leadership role and Friedman (p.16) states that,

> What counts is the leader's presence and being, not technique and know-how.
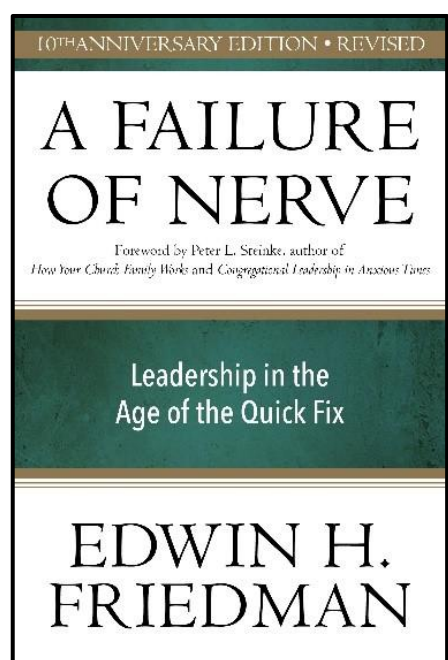
The kind of presence that is helpful is one where the chair is self-differentiated, thoughtful, and calm. A kind of presence where it is possible to be separate and connected at the same time. From this position, the chair keeps the meeting's task in mind while exploring different possibilities. The effective chair will actively relate well to others while remaining calm and non-reactive. Friedman (p.14) argues,

"A well-differentiated leader is less likely to become lost in the anxious emotional process swirling about."

This type of presence requires the capacity to observe oneself, one's behaviour, and feelings. This provides a level of mindfulness that is helpful to the chair and provides a model for others. For example, the chair might observe what kind of issues cause a particular reaction. What kind of feelings are evoked by different people in the meeting? This kind of self-observation and thinking about one's feelings and observations can provide a rich source of data. For example, a particular feeling may be straightforward about the issue at hand. Or it may be a projection of something that is not being acknowledged in the meeting or outside of it, or it may have more to do with personal matters either in the present or past.

I have certainly chaired meetings where the apparent mood felt incongruent with what I was experiencing. For example, in one case the mood seemed light and humourous, but I felt irritated and concerned. A while into the meeting something sparked a change of mood and people

became upset and worried. The apparent humour was being used as a defence against more troubling concerns. This kind of thing can happen in many ways. Another simple example is when one person always disagrees with another. It may turn out to have nothing to do with the quality of the other's ideas, and more to do with the dynamics between the two. This may be related to their personal as well as professional histories. Paying attention to everything going on in the meeting including one's feelings and thoughts can help manage unhelpful dynamics and keep the meeting on task.

With this attentive and receptive presence, the chair can reduce the level of anxiety in the meeting and improve its ability to function effectively. As all meetings take place in a wider relational system this in turn can have a positive influence on the whole organizational network. Friedman (p.19) says that the leader's integrity promotes the integrity of or prevents the "disintegration" of the system they are leading. This is true whether we are talking about the system of an organization or a meeting. Therefore, the most important task for a chair is to work on the nature of his or her being and presence. The same applies to all attendees. Arriving punctually, well-prepared, and alert can make a great difference to the quality of the meeting and its outcomes.

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APPENDIX - TEMPLATE FOR DEFINING MEETING PURPOSE & FUNCTION

This template helps clarify the purpose and function of all meetings, including 1-1 as well as group meetings. It can also be used as a helpful way of reviewing current practice.

1. WHAT IS THE MEETING TITLE (i.e., supervision, team meeting, senior management meeting, debrief, etc.)?

2. WHAT IS THE MEETING TASK (Its purpose and desired outcomes)? It should be possible to define this in one or two sentences.
2.1 What is the authority of the meeting - i.e., in making decisions?
2.2 What are the rules regarding confidentiality?

3. WHO IS THE MEETING CHAIR?
3.1 What is the role of the chair? e.g., does the chair determine the order of the agenda?
3.2 Does the chair decide the time allocated to each item?
3.3 Can the chair adjourn the meeting?
3.4 Is it clear how decisions will be made? i.e., can the chair make decisions, without a voting system? If there is a voting system, what are the rules?

4. WHO ARE THE MEETING ATTENDEES?
4.1 What roles/people must attend?
4.2 Is attendance mandatory?
4.3 What are the expectations about absence? How and when is this communicated and/or negotiated? Can an absent attendee be represented by someone else?
4.4 Can the meeting be attended online? If so, what are the expectations, on issues of confidentiality, computer cameras on/off other devices on/off, and where the online person can call in from (home, work, not driving)?

5. WHAT IS THE MEETING FREQUENCY (including set times – the day, start, and finish. Is the meeting for a specific period or ongoing)?

6. PLACE (Where does the meeting take place? Online? Is there a room booking system?)?
6.1 Is the location and room suitably accessible to all attendees? Are disability needs fully considered?
6.2 Is the room situated in a place conducive to the meeting? e.g., appropriate re noise, light, confidentiality.
6.3 Is the room an appropriate size?
6.4 Can the meeting be online?
6.5 If the meeting is online does everyone attend online?
6.6 Are there any special considerations for attending meetings online? For example, having the camera on. This is especially important when there are confidential matters to be discussed.
Not driving while meeting – this is a health and safety risk and does not allow full attention to either the meeting or driving. Rules about having phones on or off etc., are especially important as what people are doing is not so visible.

7. ADMINISTRATION - ANY REQUIRED PAPERWORK

7.1 How is the agenda made? Can attendees add items?

7.2 When is it distributed - e.g., is it done in advance?

7.3 Is any other information distributed in advance?

7.4 Are minutes or any other records to be taken?

7.5 Who will take the minutes?

7.6 How are they agreed?

7.7 Who are they distributed to?

7.8 What is the level of confidentiality?

7.9 What is the expectation as to when the minutes are produced? For example, during the meeting, within 24 – 48 hours, etc.

7.10 How long after the meeting are all minutes/records signed off as complete?

7.11 Are agreed actions reviewed at the start of the meeting.

7.12 Where are records filed? Are they secure?

8. EQUIPMENT REQUIRED

8.1 Table (size, shape) & chairs (number & quality)?

8.2 Clock?

8.3 Water & glasses?

8.4 Flip chart? Projector? Pens & Paper?

8.5 Tissues?

8.6 Do not disturb notice?

8.7 Is all equipment accessible to attendees?

8.8 Anything else?

9. ANY SPECIFIC RULES?

9.1 Is any drink and food provided, water, for example? Can attendees bring food and drink to the meeting?

9.2 Are mobile phones and other devices to be turned off, or put on silent?

9.3 How will any attendees be contacted if there is an urgent matter? Will there be a contact person outside of the meeting who can relay any urgent messages?

9.4 Any specific rules and protocols for online meetings?

9.5 Anything else?

10. HOW IS THE QUALITY OF THE MEETING MONITORED AND REVIEWED?

10.1 What training and support is provided regarding meetings and for meeting chairs?

11. ARE THERE ANY ORGANIZATIONAL POLICIES AND OTHER REGULATIONS THAT ARE RELEVANT TO THE MEETING? IF SO, HOW ARE ATTENDEES MADE AWARE OF THEM?

Patrick Tomlinson Brief Bio: The primary goal of Patrick's work is the development of people and organizations. Throughout his career, he has identified development to be the driving force related to positive outcomes - for everyone, service users, professionals, and organizations.

His experience spans from 1985 in the field of trauma and attachment-informed services. He began as a residential care worker in a therapeutic community for young people and has experience as a team leader, senior manager, Director, CEO, consultant, and mentor. He is the author/co-author/editor of numerous papers and books. He is a qualified clinician, strategic leader, and manager.

Working in several countries, Patrick has helped develop therapeutic models that have gained national and international recognition. In 2008 he created Patrick Tomlinson Associates to provide services focused on development for people and organizations. The following services are provided,

- Therapeutic Model Development
- Developmental Mentoring, Consultancy, & Clinical Supervision
- Character Assessment & Selection Tool (CAST): for Personal & Professional Development, & Staff Selection
- Non-Executive Director

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