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# INSTITUTE for SCIENTIST & ENGINEER EDUCATORS

## Guide to Effective Meetings

Institute for Scientist and Engineer Educators (ISEE)

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This paper was written and produced by the developers of the Professional Development Program (PDP) at the Institute for Scientist & Engineer Educators (ISEE) at University of California, Santa Cruz. The PDP was a flexible, multi-year program which trained participants to teach STEM effectively and inclusively at the post-secondary level. Participants were primarily graduate students and postdocs pursuing a broad range of science and engineering careers. Participants received training through two in-person multi-day workshops, worked on a team to collaboratively design an authentic, inclusive STEM learning experience (an “inquiry” lab), and then put their new teaching skills into practice in programs or courses, mostly at the college level. Throughout their experience, PDP participants used an array of online tools and received coaching and feedback from PDP instructors. The overall PDP experience was approximately 90 hours and was framed around three major themes: inquiry, assessment, and equity & inclusion. Leadership emerged as a fourth theme to support PDP teams, which were each led by a participant returning to the PDP for a second or third time, who gained training and a practical experience in team leadership. ISEE ran the PDP from 2001-2020, and there are more than 600 alumni.

### CONTEXT FOR THIS PAPER WITHIN THE PDP

This guide was developed by ISEE to be used by Design Team Leaders (DTLs) in the PDP. DTLs were returning participants tasked with leading a small team (2-3 others) in designing and teaching an inquiry activity. The guide was used as a reference for DTLs as they led their teams, providing ideas to help them employ concrete strategies that they could practice and reflect on. The guide was used in several sessions prior to DTLs working with their teams in which they used the guide to consider scenarios.

The PDP was a national program led by the UC Santa Cruz Institute for Scientist & Engineer Educators. The PDP was originally developed by the Center for Adaptive Optics with funding from the National Science Foundation (NSF) (PI: J. Nelson: AST#9876783), and was further developed with funding from the NSF (PI: L. Hunter: AST#0836053, DUE#0816754, DUE#1226140, AST#1347767, AST#1643390, AST#1743117) and University of California, Santa Cruz through funding to ISEE.

# Guide to Effective Meetings:

## Inclusive + Collaborative + Efficient

<b>Characteristics of Effective Teams (at meetings and in between)</b>
Meetings are held to make decisions or make progress toward decisions (not to talk through something that could easily have been read)
Attendees come to meetings prepared
All members make progress on tasks between meetings
Leader and team members convey their strengths and unique background potentially relevant to the team goals
Leader uses own expertise or knowledge to guide team
Individuals convey schedule constraints, when they have more or less time available for efforts toward team goal
Team members let leader know when they are stuck or have an unanticipated difficulty
Materials needed to make decisions are circulated with adequate lead time
Team members offer ideas and perspectives
Team members take risks, contribute different or divergent ideas
Team members volunteer to take on tasks
Collaboration versus divide-and-conquer is appropriately used
Goals, milestones, ideas are accessible to all team members (no “insiders”)
Team members mitigate differences in expertise by defining terminology clearly, confirming that everyone understands a proposal or idea

<b>Characteristics of Effective Meetings</b>
The purpose of the meeting is stated
Meeting includes appropriate attendees, and agenda engages all present
Time and location are chosen to accommodate whole team, and are rotated if necessary (i.e. remote meetings spanning multiple time zones)
Agenda is reviewed, and an opportunity for additions is provided
Attendees are greeted, even when late, as appropriate
One topic is discussed at a time
One person has the floor at a time
Discussion is relevant
Talking through something that could have been read prior to meeting is kept to a minimum
All members keep track of time allotted for subject and contribute to staying on time
Decisions are made and recorded
Pros and cons of issues are considered
People are comfortable asking questions or having a different opinion
When people don't understand a team member's idea, they try other ways to understand (ask for clarifications, ask for a drawing, etc.)
Everyone is recognized for their contributions
Ideas and perspectives are built on
All tasks are recorded and assigned, and followed up on after the meeting
Unfinished business is recorded so it can be carried on to the next agenda
There is a sense that people are engaged and value time spent

## In-Meeting Practices of Effective Leaders

Effective Leaders....
Make final decisions after sufficient process
Create ways to balance structured processes and room for intellectual growth of team members
Validate ideas and perspectives that are not taken up as part of a decision
Balance use of participative and directive processes as needed to achieve goals
Monitors progress toward goal and conveys to team
When goal is ill-defined, gathers or summarizes information to orient group toward a productive path
Summarize decisions and actions
Orient group toward the task at hand throughout the meeting, so the groups knows what they should be doing
Solicit ideas and perspectives from all members; try to get all points of view
Manage dominant team members both in the moment and through advanced planning if possible
Monitor time and pace of the meeting
Recognize and show appreciation for contributions and/or homework done from last meeting
Keep group on topic
Convey optimism related to the team's goals
Learn about and use each team member's strengths
Give credit to the originator of ideas
Facilitate the equitable division of tasks decided upon in meeting
Notice team dynamics and individual participation

## Optional tool: effective meetings checklist

Planning the Meeting	Yes/No
Do you have a purpose of the meeting defined?	
Have you identified all appropriate attendees?	
Have you selected a date, time, and place to best accommodate everyone? <i>(for remote groups meeting recurrently, you might consider rotating locations or timezones)</i>	
Is background reading provided with plenty of time?	
Creating an Agenda for the Meeting	
Was the agenda developed by the leader with input from the team?	
Does the agenda engage as many members of your team as possible?	
Is the agenda an appropriate amount of time?	
Does the agenda orient attendees toward the <b>decisions</b> that will be made in the meeting?	
Is the agenda circulated ahead of time?	
After the Meeting	
Are meetings notes written up and distributed promptly?	
Does leader follow up to make sure all members are carrying out assigned tasks?	
Is unfinished business noted so that it can be carried forward to next agenda?	

## Optional tool: Prompts for reflection after meetings

Reflection prompts
Did we make sufficient progress towards our goals?
Were decisions made and next steps identified and assigned?
Did everybody show up prepared for the meeting?
Did team members help each other when needed?
Was there space for questions and ideas from all attendees?
Is there a sense of optimism amongst the team?
Is everybody monitoring the amount of time they are contributing?