Tools and techniques
for leading meetings

Tools and techniques for leading meetings

In this section, we'll cover some things you can do to have a successful meeting.

What can you bring to the role?

Let's start by thinking about your strengths. Everyone brings their own personality and skills to leading a meeting.

How will you do it?

- Think about what you can bring to the role to make it yours

- Think about your personality

- Think about your skills

- Think about what you value

- Think about other experiences, including in meetings. What have you found helpful that a chairperson did or didn't do?

- Think about interests you have that could be relevant to the meeting. Are you interested in technology, for example, or supporting others to share experiences?

What I can bring to the role?

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Helpful skills for leading meetings

Lots of skills can come in helpful when you're chairing a meeting. Don't worry – you don't need to be great at them all. And remember, everyone is learning all the time.

We've listed a few helpful skills here, but you may have others you can bring to the role. There's a task on page 30 to help you think about your unique skills.

Top tip

Have a pen and paper so you can write down the names of who wants to speak next. When you invite the next person to speak, you can also acknowledge that you have seen any others who have their hands up.

For example, saying: We have a few people waiting to speak, so we'll go to Sam first then I believe Sandeep was next and then Sally.

Listening

It's important everyone feels listened to. When you're leading a meeting, you can set an example so people feel heard, encouraged and valued by you and the other people in the meeting.

✓ At the start of the meeting, write down everyone's names. It makes it easier to talk to people directly.

✓ During in-person meetings, try to focus on the person speaking in a way that feels comfortable to you. It can be useful to let people know how you listen. By doodling, for example, or making eye contact.

✓ Thank people for speaking and let them know you've heard what they said.

Phrases like this are handy: Thank you, that's a really good idea. Would anyone like to follow up on that?

✓ You could summarise one or two points group members make. This helps people feel heard and makes sure they've been understood. It highlights key points for others too. Having a pen and paper handy can help with this.

✓ If an action is agreed, clarify what it is, who's doing it and by when. This helps the note taker and makes sure everyone knows the plan.

Paying attention to the whole group

As well as listening to the people speaking, it's helpful to acknowledge the rest of the group.

✓ Try to keep an eye out to see if anyone has raised their hand.

✓ If someone hasn't spoken at all, you could sensitively ask them if they want to join the conversation.

For example, saying: I know you haven't had a chance to speak yet and wanted to check in if you'd like to add anything.

Timekeeping

It's part of your role to make sure the meeting runs to time and everything is discussed. It can feel difficult to stop a discussion or move things on when everyone is really interested. But trust that people respect your role and understand you're doing your job. No one wants the meeting to run over!

✓ It can help to let everyone know you've only got a few minutes left on a topic. Explain you'll need to move on shortly or after the next person has spoken.

✓ If lots of people want to speak but time is running out, try to give people options. You could acknowledge you may not get to everyone but offer other ways for people to share their views. Like via the chat if you're online. Or via post-it notes or email.

✓ If something is raised that isn't on the agenda, say you'll add it to any other business (AOB). If you don't have time to come back to it, make a note to add it to the agenda for the next meeting.

✓ If a topic feels important and like it needs more time, you could shift other items to the next meeting or say you'll continue the topic next time.

Top tips – ideas board

Often people come up with great ideas, suggestions or questions that aren't related to the agenda.

Having an ideas board to note these down helps move the conversation on. It also makes sure people feel listened to.

In person, this could be a big sheet of paper or whiteboard. People can add to this with pens or post-its.

Online, you could use a Google Jamboard or the chat function.

If people go off topic, thank them for their contribution and remind them about the ideas board. You might want to remind people about the remit of the meeting too.

It's a good idea to read out the ideas board at the end of the meeting. It helps everyone feel acknowledged and valued.

And after the meeting, you could add ideas to the next agenda or pass them on to the staff member to follow up.

Handy phrases to keep to time

Thanks. That was really useful but we need to move on now.

That's a great idea. Can you add it to the ideas board so we don't lose it?

We can put this in any other business to pick up later.

Can you think of any others?

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Creating a group agreement

A group agreement helps everyone feel safe, included and heard. It's a place to list a few guidelines for everyone to follow during meetings. You could put 'creating a group agreement' as the first agenda item if your group is new or doesn't have one already.

Together, everyone decides on the guidelines you want to follow. Make sure someone notes these down. They are often about things like respecting each other's ideas, using simple language and speaking one at a time.

It's important that everyone agrees the guidelines. You could ask everyone to raise their hands (physically or virtually).

It can help to remind people of the agreement before each meeting. And make sure it's easy for people to access. You could email it to everyone and share it with new people who join your meetings.

❝ **Set out group agreements around respecting each other and keeping things confidential, as well as setting expectations around work between meetings and the timing of meetings. For example, when will there be breaks and how should people look after themselves if they need more breaks or need to leave a meeting?** ❞

– Chairperson with lived experience

Creating a group agreement

How will you create a safe space for people taking part?

Why use this tool

A group agreement helps everyone taking part feel safe, included and heard within group discussions.

This tool can be used to facilitate a discussion, and to record the agreed outcome.
A group agreement can be used regularly at meetings, or for one-off discussions.

Step-by-step

1. Print the template in A3 or copy it onto a flip chart, have sticky notes to hand. If working online make sure someone is taking notes and everyone in the group has a has a chance to review the agreement before it is finalised.

2. Explain the benefits of a group agreement; agreeing how everyone will communicate and behave within the meeting or discussion within the meeting or discussion space will help create a safe atmosphere where people feel free to speak their minds and be heard without fear of judgement.

3. Ask the group to think about good guidelines for communication and note ideas down on sticky notes. If working online you could ask people to contribute via the chat. Discuss with the group why they like these guidelines, and which of the suggestions they'd like to commit to. Write these down on your template.

4. Ask the group to think about how they would like people to behave in the meeting or discussion space, and write these down or share them with the group. Discuss with the group what types of behaviour would and wouldn't be helpful during meetings. Suggestions might include ensuring mobile phones are on silent during the meeting, agreeing that members may take a break from the meeting if they feel overwhelmed, and that everyone's opinion should be respected. Ask the group which of the suggestions they'd like to commit to, and add these to your template.

5. If you are using the agreement for more than one meeting ask everyone to write their name underneath to show their commitment to the agreement. If you were working on a flip chart take a photo and share it with all members. You could also type up the group agreement and email it to the group or print out copies. It's important to ensure all members and any new members have a copy and agree to it.

Top tips - Remember

It is the groups responsibility to stick to the agreement. Any member can refer back to the agreement if they feel unsafe, or that any part of it is not being respected.

Please print this out or type in the text boxes available.

Creating a group agreement

Date of Agreement	Name of Meeting

Attendees present	Date to review
(Use initials for people's names)	

As a group we agree to:

I agree to this agreement

(Ask people to sign or add initials here. If new people join you can ask them to sign here too)

Supporting **everyone** to take part in meetings

People might want to join in with your meetings in different ways. It can help to think about how you can support this, so the meeting is accessible for everyone.

People might find it difficult to respond in the moment.

To help with this, you could send information out before the meeting. And you can let people how to send ideas for you to include in your summary email or in the next agenda. Remember people might prefer their points to be anonymous.

Check ins

Checking in with people can be a good way to start a meeting. It helps people let each other know how they are doing. And it shows how important everyone's wellbeing is.

Check in ideas

1. Use a traffic light system. Red is not great. Amber is in the middle. Green is good.

2. Ask people where they are on a scale of 1 to 10. 1 is not great. 10 is amazing.

3. Online, ask everyone to use an emoji to sum up their day or how they're feeling.

Remember

Some people might not feel like checking in. That's fine too. It can be a good idea to ask people to check in if they want to or feel comfortable doing so. You could start by letting people know how you're feeling. But it's also important to let people know if you don't feel up to sharing.

Warm-up activities

Fun warm-up activities are used to help people get to know each other better.

They can help people relax and get used to speaking in a- meeting. This can be especially useful if people haven't worked together before.

Questions to ask for a warm up

1. What item would you take to a desert island, and why?

2. What's your favourite thing to do to relax, and why?

3. What's your favourite place to visit, and why?
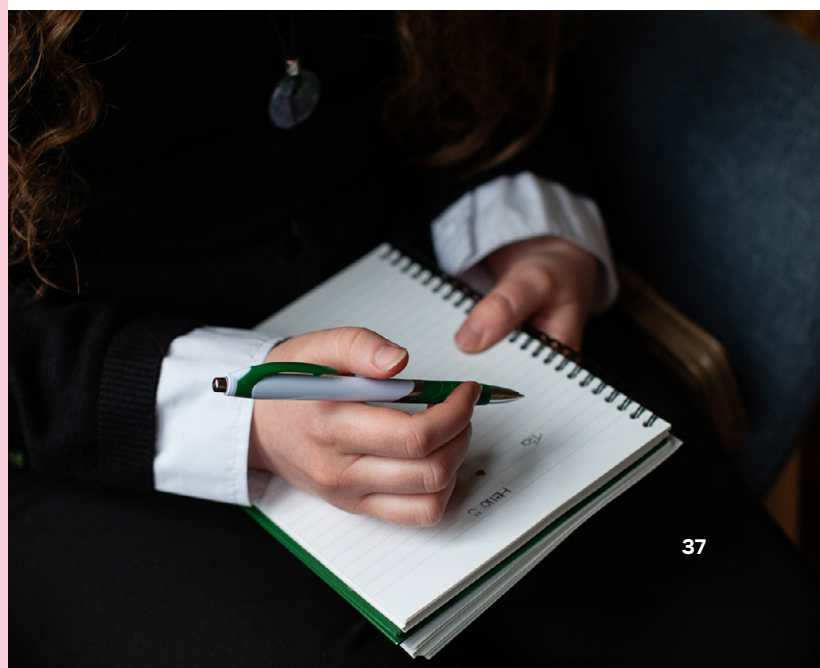
Think about different ways you can present information so everyone feels engaged.

This might be through a PowerPoint or images.
Or you could invite a guest speaker.

Try to have different ways for people to understand what you're covering.

If there's a PowerPoint, can you email it out beforehand with speaker notes? Can you sum up what you're covering in bullet points?

In person, you can use post-it notes and pens to give people an alternative to speaking out loud.

You can use coloured cards for group votes too.
Green is yes. Red is no. Amber is not sure.

Try using a mix of individual and group tasks.

People like to learn and get involved in different ways.
This makes it more likely that everyone will feel heard.

Sensitively involve people in different ways.

Some people may take time to feel comfortable.
Because you're leading the meeting, you can give them that time. You can also ask if people want to add anything before moving on from an agenda item. And you can invite people who haven't spoken yet to speak first about the next topic.

Handy resources for running online meetings

How to run an online activity

Online platforms and accessibility

Top tips for online meetings

✓ Check the sound before you start.
Make sure people can hear you and you can hear them.

✓ Ask people to use the mute function when others are speaking.

✓ Let people know they can use the chat as well as speaking. You or the person keeping an eye on the chat can then read comments out loud.

✓ On Zoom, you can use the closed caption function. This transcribes what everyone says so people can see subtitles or a full transcription.

✓ Some apps, like Zoom, have breakout rooms. This can help you have smaller group discussions, so everyone has a chance to take part. If you do use breakout rooms, make sure one person in every group takes notes. They can then summarise the conversation to the group afterwards.

Inspiring people to come up with ideas

This can feel daunting but there are lots of ways to help people feel creative.

In person, you can put different questions or prompts on each table, along with pens and paper.

Ask people to go around the tables and write their thoughts down. If they agree with what someone else has written, they can put a tick next to this. This is sometimes called a World Café.

Online, if people are happy to do so, you could use tools like Google Jamboard.

They help people share ideas and collaborate online.

Handy resources for generating ideas

The Mind Influence and Participation Toolkit has lots of creative ways to involve people in meetings

39

Managing different points of view

**Sometimes people may disagree or have different points of view.
To help everyone work through this, you could:**

✓ Acknowledge and sum up the different points of view

✓ Possibly add the subject to the next agenda so people can keep talking about it

✓ If a decision is needed, arrange an anonymous vote during the meeting or afterwards

✓ Refer to the group agreement

Helpful phrases to manage different viewpoints

We're running out of time and it doesn't look like we'll get this decided today. I'll put it on the agenda for next time.

I can hear there are strong arguments on both sides.

Can you think of any others?

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Making **decisions together**

It's important to decide how you'll make decisions in the meeting. If you're leading an existing meeting, ask the staff member or previous chairperson how it's been done before.

You could ask:

✓ Why you're having the meeting and if the meeting group needs to make any decisions.

✓ How many people are needed to carry out a vote?

✓ How many people need to vote the same way for it to pass?

✓ Does the group vote by raising hands, voting anonymously on paper or using an online poll?

✓ Is the voting process covered in a group agreement?
Read more about writing a group agreement. Page 34

✓ Does the group make any decisions on a regular basis?

41

Managing your own opinions

Sometimes we feel passionate about a topic discussed in meeting. That can be particularly true if it relates to our lived experience. It's important to think about how you'll manage this when you're leading the conversation.

✓ You can give your input on any topic. But make sure everyone else feels supported to take part in the discussion too.

✓ Even if you have personal feelings, you need to remain open to different views. Make sure these are heard before any decisions are made.

✓ If you feel managing your opinions will be difficult or you're too close to an agenda item, you could ask someone else to lead that section.

Supporting people's wellbeing

Everyone in the meeting should put their wellbeing first. If anyone needs to step away or is struggling, Mind staff members should be there to offer support.

And, when you're leading meetings, there are important things you can do to help people feel comfortable.

For example:

✓ Saying at the start that it's fine for people to step away at any point.

✓ Letting people know they can take part however feels best for them that day. Online, that might mean switching their camera off or putting their thoughts in the chat.

✓ Check in at the start of a meeting. This helps people understand how others are feeling. (Find check in exercises on page 37)

✓ Speaking to a Mind staff member to agree who you should talk to if someone isn't well or if something happens you're worried about.

✓ Including in the group agreement that people should only share what they feel comfortable about their lived experience. You can encourage people to be mindful that their experiences could be triggering for others, too.

❝ Everyone wants you to do well and support you. I have grown in confidence in my own abilities. ❞

- Chairperson with lived experience

Celebrating success

It's important to reflect on what the meeting group has achieved over time and celebrate your time together.

Here's an exercise that works well:

Exercise: 1 positive thing

Every 3 or 6 months, why not take it in turns to celebrate success? Finish your meeting by asking 1 person to talk about 1 positive thing they enjoyed or think went well. You could even do this every meeting. It can help you review your progress over time and think about what you want to keep improving.

Don't be afraid to try

You won't know everything there is to know about leading meetings – and no one expects you to. When you first start, you might not feel you have all the skills you need. But remember that every chairperson chaired a meeting for the first time once. There's no better way to learn than by trying while making sure you have the support you need.

❝ **I've grown in confidence a lot, particularly as I've often chaired meetings where I'm the youngest by about 10 years! I've learnt to ask for support more, like getting someone else to take minutes, and telling people my access needs, like speaking one person at a time and using the hands up function so I can manage conversations.** ❞

- Chairperson with lived experience

Kayla's story

Kayla leads the Equality, Diversity and Inclusion co-production panel at West Sussex Mind. She explains what she has learned and what the experience means to her.

My responsibilities include setting meeting agendas, managing the meeting time, facilitating discussions, ensuring all panel members have an equal opportunity to participate, representing the panel in external meetings and at events, and encouraging the active participation of all panel members.

It is important to remain on task during meetings and often discussions can steer the conversation away from the main goals of the meeting. Being able to recognise when this happens and gently steer the conversation back on topic is an important skill to have. However, it is equally as important to recognise when there is value in moving off topic by making a note to discuss at a later date or determining if the topic is worth exploring there and then.

We involved every member of the group in creating group guidelines to create a safe and relaxed environment in which every member would feel comfortable and able to express themselves. Within those guidelines, we included a traffic light system in which attendees can share how comfortable they are discussing a topic.

Check ins give us the opportunity to find out how everyone is feeling and if there are topics that could be upsetting or triggering. A warning can then be given and any member can opt out of those types of discussions if they wish to. That gives the Chair a heads up on how to broach these subjects.

We use project management software to create boards and actions and to share resources and agendas. This is so the history of the meeting is accessible to everyone and open to everyone.

❝ The best part of the role is enabling all members of the panel to have their voice heard, to demonstrate the impact they have on each project and to ensure their contributions are recognised in the panel and to external groups and organisations. ❞

Louisa's story

Louisa is a staff member at West Sussex Mind, where she supported Kayla to thrive in her role. These are Louisa's tips for success.

When introducing new people to the panel we make sure to provide them with links to our engagement pages. These include our member biography pages. We also provide the option for new attendees to speak to the chair, deputy chair or community and inclusion manager before and after the meeting. This allows us the chance to provide a new member with the chance to settle in, to ask questions and go over any documentation needed for the meeting.

It's important to think about how you can reduce stress of activities for people attending. For example, you can provide help with technology, equipment, and getting agendas and information out in time. You need to make sure everyone can access what they need, and you might need to lend people resources and equipment if they are joining digitally.

We need to set up people to succeed, in terms of making sure they have resources and making sure we're following a 'do no harm' approach. Following our values is vital. We also need to be ambitious to harness the power and the insight of members as a serious and authentic part of our service delivery, and equally we need to harness the power of our organisation, making sure it has the structure and resources to go the extra mile.

❝ The best part of working with this group as a staff member has been seeing how my core values have been realised as a worker in an organisation and by working together with the group to turn awareness into action. ❞

46