Meetings are a great and necessary part of office life. In running meetings,   
our colleagues’ time, energy and enthusiasm are resources to be used carefully, supported and protected.

**How do we help meetings work for us?**

This document provides a simple health check for meetings. Use it and adapt it in your area.

You can use this health checker as an individual or as a team.

**If a meeting does not have a clear purpose, is not looking for something meaningful to come from it, is not needed, is not run well, gives rise to no visible consequences… it is at least open to question.** The purpose and outcomes questions are key for any meeting.

The health check gives you a way of looking at all of your meetings and deciding on which ones to focus on – which ones need the most attention in helping them work for you. Here are four key questions to ask yourself about the health check. On your own, or starting out with some colleagues, answer the following:

|  |  |
| --- | --- |
| Why are you doing this health check? |  |
| What are you looking for from it? |  |
| Who needs to be part of the health check? |  |
| How will you run the health check? |  |

**Behaviours – standards – ideals**

A quick note on meeting behaviours.

One of the challenges areas that arises is in some folks’ **behaviours** in and around meetings – not preparing for a meeting, not giving space and room to other to participate, a chair not taking time to prepare properly, doing more talking than listening etc. etc.

People are not always conscious of how they behave or what is expected of them in how they participate in the meeting. Set some **standards**.   
Finding a way to express the expectations can be a challenge if you are looking at addressing issues in a long-standing meeting. It is easier to name expectations when setting up a new meeting or a one-off. And you typically see this guidance on participation given as a matter of course at the start of workshops.

The standards we set come from the **ideals** we have – around participation (‘everyone has a voice’), around how to make the best use of time (‘our time is precious – let’s make the best use of it), around ensuring meeting flow (‘how do we best ensure we get to the kind of outcomes we are looking for?’)

Setting standards is a way of giving voice to your ideals and a way of shaping the behaviours you would like to see.

**Clear before**

POPP - the four key things you check about a meeting are clarity on the following:

Purpose: Why are we having it?

Outcome: What are we looking to get from the meeting?

Ask: Do we need a meeting for this?

People: Who needs to be there?

Process: How will we run the meeting so as to help these people achieve this outcome?

**Clearly run**

In terms of ensuring you get what you need from the meeting, how do you help the participants take part?

Agenda used Agendas give structure. They allow *meeting flow* to be managed.  
 The help folks prepare and know what to expect.

Technology used Zoom, Google (Docs, Currents, Keep etc.), Mural etc.

Chairing If there is a chair - their preparation for the meeting, and setting behavioural expectations, and managing the flow - are key. If you do not have the skill you need help in developing it.

Behaviour expectations Participants need to know, up front, what is expected and therefore the behaviours to which they can be held to account.

Notes / minutes / actions?

**Clear after**

What happens afterwards?

Did / do actions come from it?

Are actions noted and tracked?

Are they concrete actions, with an owner attached, or aspirations with no specifics?

Do participants get feedback/updates? How do you make the value of their contribution clear?

**Different kinds of meetings**

We all know there are lots of kinds of meetings. You can still use the health checker across them all – from meeting a friend for a Zoom coffee to a staff meeting to running and exam board – but you will use the ideas in different ways in different contexts.

**Using the health checker**

What about your meetings? You can do the following checker on the next page on your own or with your team. List all your meetings. If with your team, agree which emoji best captures the point in question, then prioritise meetings for action, or general actions for meeting. A spreadsheet might be good for this. (You can cut and paste the table below into a spreadsheet as a starter).

Agree why they headings in the health checker are important in a health check.

Do something with the insights you gain. Make some changes. Come back in a couple of weeks or a month, at most, and do the health check again. Did your changes make things better?

**Checking the health of our meetings**

This is a visual check – everyone gets to put a green smile, a beige neutral or a red sad in against the columns from ‘Purpose’ on. They do not have to justify or explain their take on the meeting.

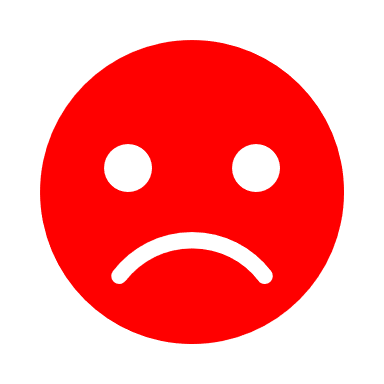
Do this for all the meetings in your list. You will get a heat map from this.

Clusters of reds or beiges will draw your attention and help you focus in on meetings that need attention or, perhaps a pattern in one of the check areas, such as meetings regularly being held, where the consensus is that they are not needed for the purpose and outcomes in question.

The purpose is to get you from thinking about ‘all our meetings’ to thinking about specific meetings or aspects of meetings that you can look at in more detail, decide on actions to be taken, take actions and check back that they have had the intended result.

If you use this approach more than once you may find yourself adjusting the categories you check, or perhaps fleshing out ‘participation enabled well’, for instance.

Make this your own.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ID | Meeting | Own, influence or attend?  *(O, I, A)* | Frequency  *(Daily, weekly, ad hoc etc.)* | Purposes for holding is clear? | Outcomes are sought? | Meeting needed for this? | The right attendees take part? | Participation enabled well? | Decisions taken / actions arise? | Feedback / updates provided? | Overall health |
| 1 |  |  |  |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |  |  |  |