



Collaborative Team Meeting Ground Rules & Logistics: What Works

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These collaborative team meeting ground rules help to make meetings productive and efficient while promoting shared team ownership.

- **Team Membership:** Approximately ten (10) decision makers passionate about the topic. Membership depends on purpose. Members need to be decision makers who have a stake in the purpose of the team and whose buy-in is important to the success of the effort. Members need to be able to commit resources toward the work of the team as well as the eventual goal of the work. If the decision maker can not be a member, their designee needs to be able to have ready access to them and to be able to commit resources and report decisions within one or two weeks of the meeting. Team members need to be committed to team decision making and being a positive and productive team member.
- **Team Roles:** (Some or all of these roles can be volunteers from team; can be scheduled ahead of time or designated at each meeting)
 - **Team Members** = Participate fully. Communicate with the constituencies they represent. Have the willingness and expertise to help the team accomplish its work.
 - **Host** = Handle logistics of meetings. NOTE: This role may be shared if the team believes that it is helpful to rotate meeting locations.
 - **Facilitator** = Leads team meetings in a way that is perceived to be fair, helping the team stay focused, and supporting the building of relationships needed for effective work. NOTE: This role may be an outside facilitator or a team member that is viewed as objective and fair or a role that is shared by team members who take role at different times. It may also be the same person as the Convener. The key is to have a facilitator that is experienced in using activities and strategies that promote shared decision making and ensuring all opinions are heard, as well as able to facilitate difficult decisions and discussions.
 - **Recorder** = Record decisions for team and disseminate to team; each member will take their own notes. Maintain team's "master" file or notebook.
 - **Timekeeper** = Keeps track of time allotments on agenda and reminds team of time remaining for each agenda item so that the team can complete items in a timely manner OR adjusts agenda as needed.
 - **Provider of refreshments**=if the team chooses to provide refreshments, this task can also be shared among team members.
 - **Ad Hoc Members/ Stakeholder Input:** use of ad hoc members, workgroups and focus groups to ensure broad representation and needed expertise and input. Not necessarily on team as regular members but involved on an "as needed basis" via work groups, survey, interviews, special projects, etc. as needed to accomplish particular tasks.

- **Meeting Attendance:** Teams should meet at least monthly. Members attend rather than sending representatives, prepare for meetings, if must be absent-review summary, talk to Facilitator for updates.
- **Decision Making:** Use consensus if possible. If consensus is not achieved, use: “*modified consensus*”, i.e., what can be changed so that we can live with this decision and publicly support it?
- **Support Decisions:** team decisions must be supported by everyone; use modified consensus if necessary; if it is necessary to miss a meeting, support decisions made in your absence.
- **Decision Making Strategies:** use strategies and activities that promote shared decision making as well as ensuring that everyone feels that their opinions are valued. Decision making activities are important to ensure that all voices are heard, the best decisions are made and that there are no feelings of “winners and losers”. A resource for meeting facilitation activities is: Hayden, Frederick & Smith (2003); *A Road Map for Facilitating Collaborative Teams*;
<http://store.cambiumlearning.com/InitialSearchResults.aspx?searchtype=Basic&sorttype=Basic&Query=Hayden&criteria=0100&site=sw>
- **Interactions:** Respect all opinions (all ideas have value), engage in respectful disagreement, talk one at a time, share decision making, share the floor, honor confidentiality, etc.
- **Establish Shared Meaning:** establish a team vision and mission statement to ensure all are on the same page about the direction of the collaborative work; establish shared ground rules about meetings and interactions; ensure shared understanding of terms, concepts and where there is confusion or uncertainty, establish shared definitions.
- **Meeting logistics:** establish schedule of meetings (should be at least monthly); time of meetings (often teams find that meeting first thing in the morning contributes to better attendance) and most meetings can be teleconferenced and 1.5 to 2 hours focused on agenda topics; face-to-face meetings can be 3 to 4 hours focused on agenda topics; determine culture of group re: providing refreshments, location of meeting, whether there will be administrative support or whether all tasks will be shared by team members, whether family members need support such as stipends, whether free parking is needed, etc.
- **Meeting Agendas:** each meeting should be driven by a written agenda with meeting objectives which are collected at the end of the prior meeting; agenda emailed one week in advance with a reminder the day before.
- **Action Plans:** the work of the team should be guided by a written Action Plan. This plan is based on the shared vision; contains measurable goals and objectives with timelines, resources needed for meeting the objective and who is responsible. The Action Plan can be used as the meeting agenda to ensure that all meetings are action oriented and focused on the shared vision and Action Plan the team has adopted and that progress is being made on the vision and Action Plan.
- **Meeting and Team Evaluation:** provide an online evaluation form emailed after every team meeting that asks if the objectives of the meeting were attained, was the meeting worth while, and did the team member feel they participated and felt valued.
- **Worthwhile Meetings:** make sure that every team meeting accomplishes something on the Action Plan so that all team members can see tangible evidence that the meetings are worth their time. Have short and long term objectives so that the team can accomplish actions early on while working on the harder more long term items.
- **Meeting Summaries:** written summaries of the meetings are provided after each meeting containing at a minimum the decisions and actions taken at the meeting. The team can decide how thorough they want the meeting summary/minutes to be.
- **New Member Orientation:** “Buddy System” (the Facilitator provides information and a file of up to date materials to new member).
- **Universal signal:** i.e. hold up index card if group should move on from current issue.
- **Start and end on time.**
- **Stay outcome-focused:** Use “Taxi Pad” when appropriate.

- **Celebrate big and small accomplishments!** All work and no play or celebration makes the team dull! Celebrate accomplishments, birthdays, other professional and personal milestones. Become a community and build relationships. Remember: the team members were selected because of their commitment and passion toward the focus of the team. Everyone wants to succeed and make headway. Stop and acknowledge each step toward the vision!