



UNIVERSITY OF
CAMBRIDGE

Effective Meetings Toolkit



our cambridge



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1. INTRODUCTION

This toolkit has been produced by the *ourcambridge* team, in collaboration with the community of *ourcambridge* champions and colleagues from across the University. It is designed as a comprehensive guide containing resources, top tips and handy checklists. It covers all elements of meeting organisation, from scheduling and chairing a meeting, to attendance, minutes and follow-up actions. The aim of the toolkit is to support the delivery of more effective and efficient meetings across the collegiate University.



Regardless of our role, one common factor for most of us is attending meetings. While the format, frequency and your role within the meeting may differ, when a meeting is run well it is a great resource that can advance a project, provide networking opportunities and facilitate the sharing of ideas and resources. However, an inefficiently run meeting can be draining and have a negative effect on our time, projects and wellbeing.

We hope this guide provides you with the tools, insights and confidence you need to help make meeting attendance a positive experience, one which is most effective for you, your role and the University as a whole.

Key figures

In [2019](#) the average British worker spent more than 26 days (or 213 hours) in meetings. 72% of UK professionals reported losing time due to poorly organised meetings (according to the [Doodle: The State of Meeting Report 2019](#).)

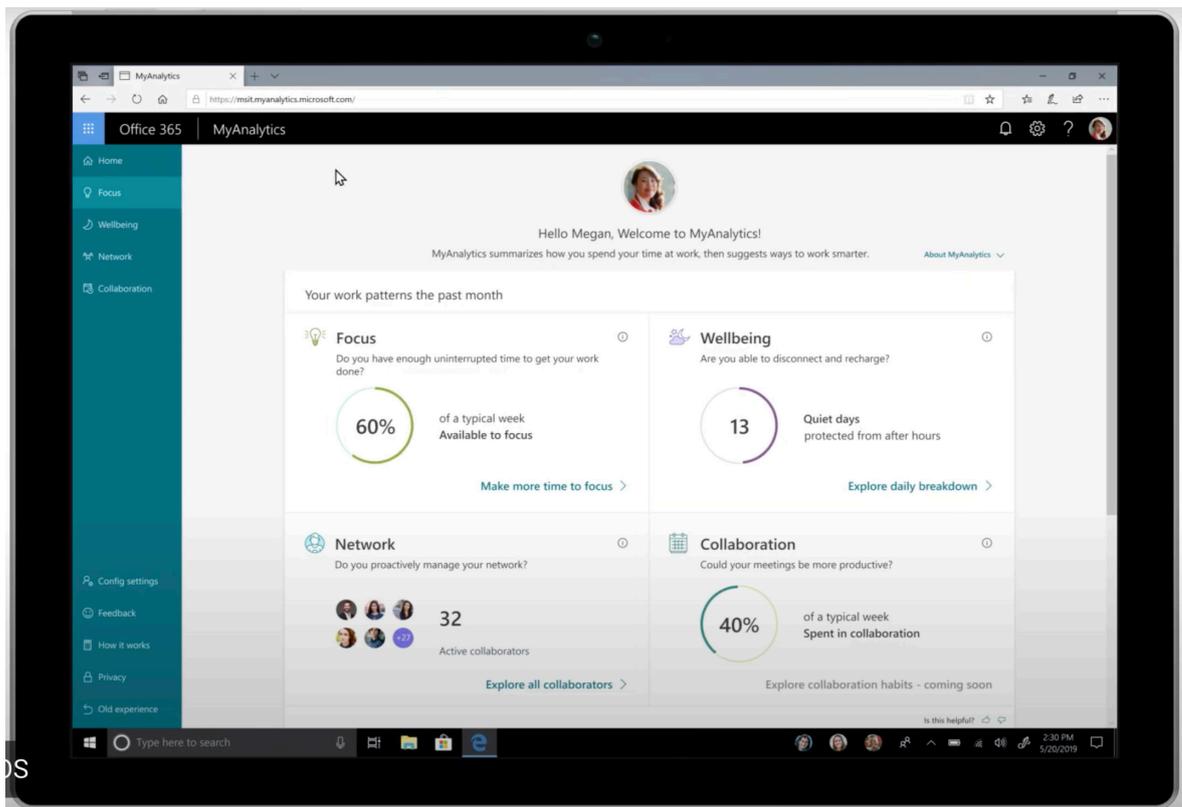
University of Cambridge – Yammer poll

The *ourcambridge* team conducted a Yammer poll asking, 'roughly what proportion of your working week is taken up by meetings?' 40% of respondents reported that they spent over 40% of their working week in meetings. Whilst this is lower than the [national average](#) (nearly one million British workers reported spending more than 50% of their time in meetings), it highlights the negative impact in terms of time that meetings can have if they are not run effectively.



DID YOU KNOW

Office 365 has an app called 'MyAnalytics' which tells you (based on your Outlook calendar) how much of your time is spent in meetings. The dashboard function is a great resource, providing feedback and information on: how much time you have available to focus on your work tasks, how you manage your networks, collaborating productively with your colleagues, and maintaining your wellbeing (how many quiet days you have). Why not try using the app to see how much of your time is spent in meetings, and identify how you can best allocate your time and resources?



Top tip

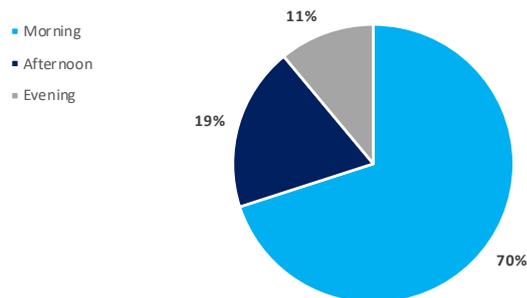
Don't forget to add your working hours (by selecting 'config settings' on the dashboard) to get an accurate representation of how your working time is spent. You can find out more about MyAnalytics on the [Microsoft website](#), or view this short [LinkedIn Learning video](#).

Other key statistics

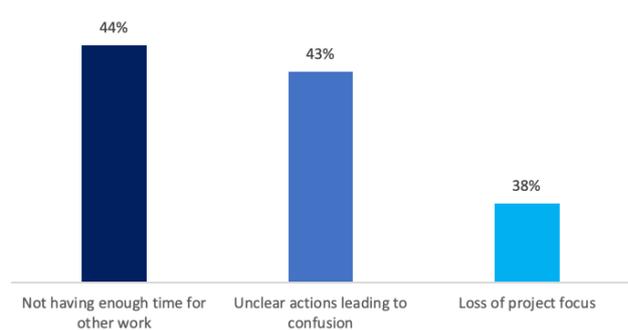
(from Doodle: The State of Meeting Report 2019)

- 70% of professionals reported that meetings are best held in the morning (8am – 12pm), as opposed to the afternoon (19%), and before work/evenings (11%)
- Ineffective or poorly organised meetings were noted as the most common meeting bugbear, with poorly organised meetings reported as resulting in:
 - not having enough time to do other work (44%)
 - unclear actions leading to confusion (43%)
 - bad organisation resulting in loss of project focus (38%)

Best meeting time



Effects of poorly organised meeting



During focus groups University of Cambridge staff reported some of their top meeting irritations

1. Role of the Chair

- “Poor chairing/lack of direction and structure from those leading the meeting”
- “Chairs who don’t ensure that all voices are heard or are comfortable to speak if they have a point”

2. Agenda/organisation

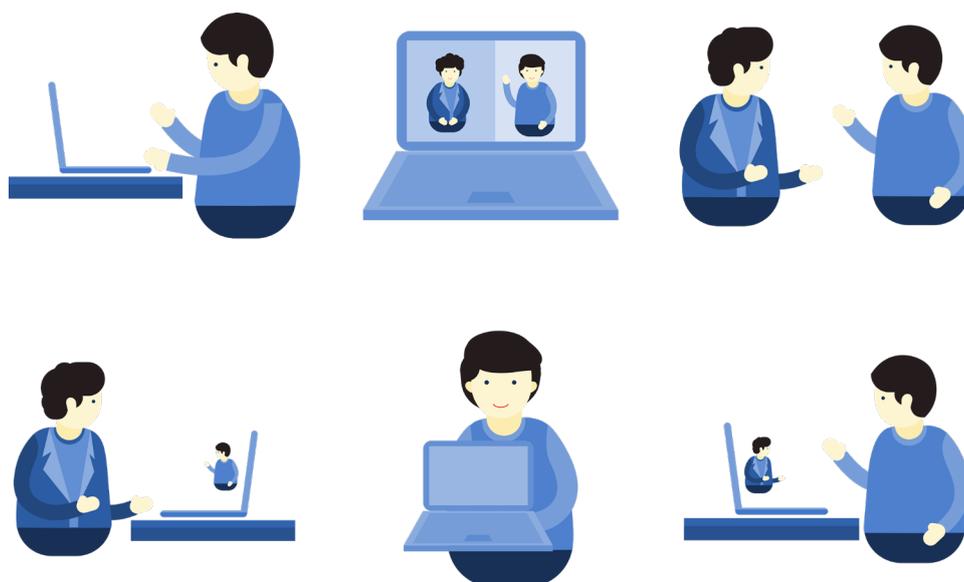
- “A meeting with no agenda which results in no focus, no outcomes, and no participation”
- “Unclear purpose/lack of substantive business”

3. Attendee behaviour

- “One or two people dominating the discussion, or spending long periods on topics not relevant to most of the attendees: treat people’s time as valuable”
- “People pushing their agendas rather than a true discussion of what the business needs and how best to get there”

2. WHAT IS AN EFFECTIVE MEETING?

We have outlined some top meeting irritations (both within the University and across the UK), but what are the different types of meetings and what do we actually mean by an effective meeting?



Different types of meetings

You may have noticed the large variety of names given to meetings across the University. These can range from one-to-ones, team meetings, working groups, committee meetings, board meetings etc. The definition of these may vary between individuals, teams and organisations.

Meetings can also be classified into 'meeting types', as defined by Andy Grove (former Chairman and CEO of Intel), when he describes [process-orientated and mission orientated meetings](#).

PROCESS-ORIENTED MEETINGS – happen when “knowledge is shared and information is exchanged. Essentially, it is discussion that takes place on a recurring basis”. These can include one-to-ones and team meetings.

MISSION-ORIENTED MEETINGS – are designed to “produce a specific output, frequently a decision”. These include committee meetings where the key to success is the role of the Chairperson.

This toolkit includes guidance for both meeting types.



DID YOU KNOW

There are over 370 formally constituted Committees, Boards or Syndicates in the University.

What is an effective meeting?

We asked staff across the University what makes an effective meeting. The findings fell into five main categories:

1. An effective Chairperson

"The role of the Chair is key"

2. Preparation and planning (including the importance of the agenda)

"Clearly define the purpose and aims of the meeting with all attendees"

3. Fair contribution

"Ask everyone at the meeting for their input, ideas and chance to say something"

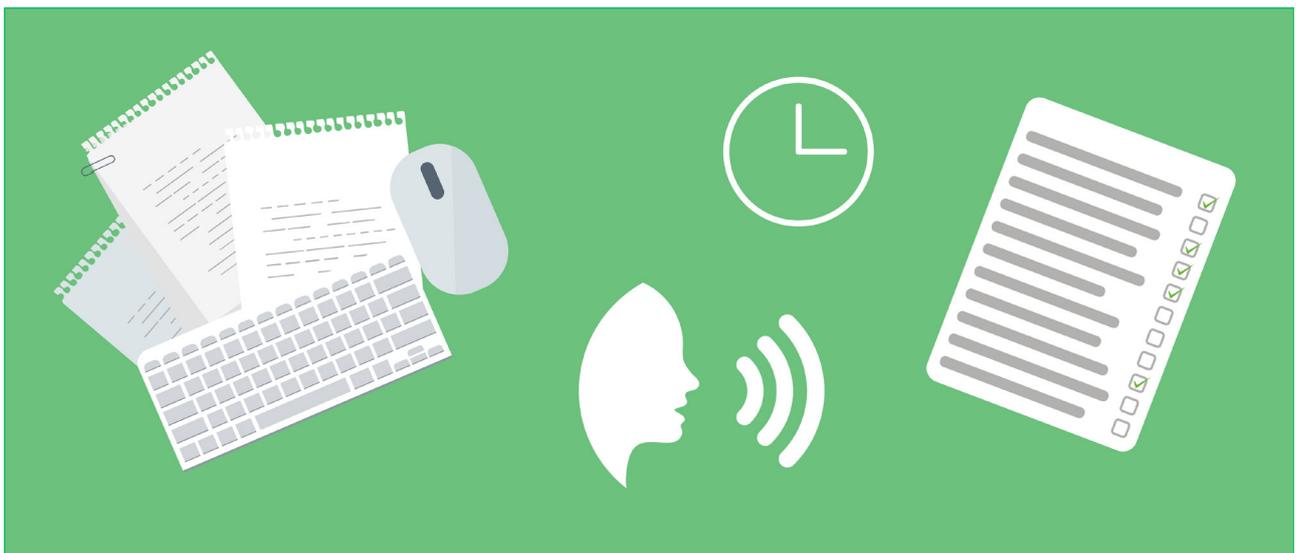
4. A well-run meeting

"Keep everyone engaged, check for understanding, unsolicited questions break the time, set expectations"

5. Detailed and efficient follow-up actions

"All meetings should have action notes or minutes"

Many of these elements can also be found in Personal and Professional Development's [Key Principles of Effective Meetings](#), and the 15 Principles of Effective Meetings taught on Quality Management courses at the Judge Business School (see next page).



Quality Management

– 15 Principles of Effective Meetings

- 1 Start punctually**
- 2 Keep to agenda, objectives, items, timings**
- 3 Avoid side conversations**
- 4 Don't interrupt**
- 5 Listen**
- 6 Add value**
- 7 Silence is assent**
- 8 If you want an individual's view, ask for it**
- 9 Remember all individuals are equal during meetings**
- 10 Critique ideas NOT individuals**
- 11 Encourage everyone to take their own notes**
- 12 'Car park' issues not capable of resolution at the meeting**
- 13 Summarise and confirm key actions**
- 14 Provide time to review the meeting process**
- 15 Finish punctually or early**

You may have your own ideas of what constitutes an effective meeting. However, as identified in [this blog post from WorkLife](#) - the key element is that, "an effective meeting brings a thoughtfully selected group of people together for a specific purpose, provides a forum for open discussion, and delivers a tangible result: a decision, a plan, a list of great ideas to pursue, a shared understanding of the work ahead. Not only that, but the result is then shared with others whose work may be affected".

We will look further into these principles later in the toolkit, and how some relate more specifically to the different roles you can hold within a meeting, e.g. the Chair, the minute-taker and meeting attendees.

3. DO I NEED TO HOLD A MEETING?

Before organising a meeting, there are two key things it is best practice to consider:

1. Why you want to meet and what the aims of the meeting are

The answer to this question will help determine:

2. If you need to hold a meeting

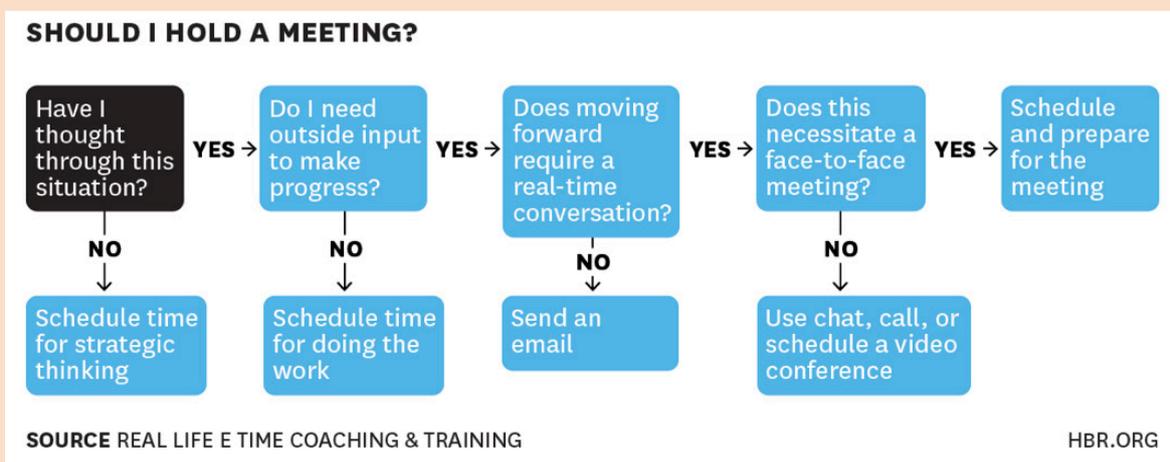
Decide why you want to meet and the aims of the meeting

So, you think you need to hold a meeting? Take time to consider why you want to hold the meeting. What is the goal of the meeting, what would you like to achieve, and what would a successful meeting look like to you? For example, it could be to confirm content of a project plan, agree final sign off for a programme, or generate ideas to feed into a conceptual paper. Once you know the answer to these questions, consider if the outcomes and aims you have identified could be achieved without holding a formal meeting.

Do you need to hold a meeting?

It can be tempting to hold a meeting to gain clarity and answers on a project, in fact just the act of 'holding a meeting' can give a sense of progressing a project or piece of work. It is, however, important to review the situation and plan in some time to think strategically about the project and whether your answers and aims could be achieved without a meeting.

The Harvard Business Review has included a handy decision tree in their [Do You Really Need to Hold That Meeting?](#) article.



The key elements to consider are:

1. Do I need outside input to make progress?

Can you move forward some of the work without the input of your colleagues? If so schedule time in your diary to do this.

2. Does moving forward require a real-time conversation?

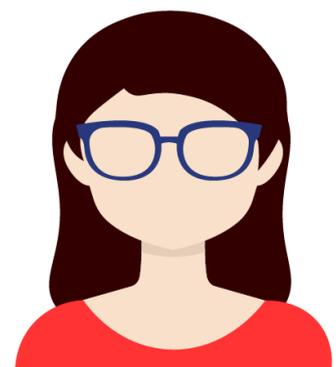
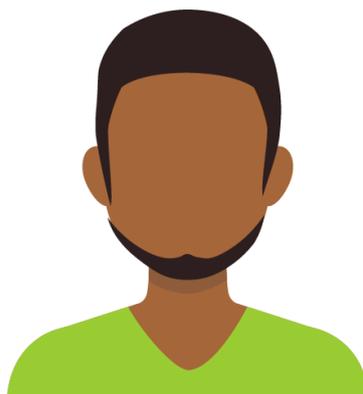
It may be that you need feedback and guidance from your colleagues or project team, but does this need to be in a 'real-time' conversation? If you need feedback on a document it could be preferable to gain this via email, as opposed to holding a meeting. In this instance your colleagues can review the document at a time that best suits their needs (within the timeframe of your deadline).

3. Does this necessitate a face-to-face meeting?

There are a number of ways you can communicate and gain the required input without holding a formal meeting. This could include a one-to-one phone call, or having an informal discussion on Microsoft Teams. Our colleagues in UIS have created a [Teams Hub](#) where you can find helpful top tips and detailed guidance on how to use Microsoft Teams.

For a more detailed decision tree and guidance on whether you need to hold a meeting, visit the 'Can you accomplish your goals without a meeting?' section of the LinkedIn Learning course '[Leading Virtual Meetings](#)'.

Once you have decided that a meeting is necessary, what are the next steps? The next section will explore some top tips on preparing for and scheduling a meeting depending on your role.



4. MEETING ROLES

Professional Services Values

Regardless of your role and the type of meeting you are attending, you should actively try to demonstrate the professional services values in the way in which you participate. These are:

TRUST

- We have honest and open relationships underpinned by our shared values.
- We create an environment where people feel empowered.

RESPECT

- We are inclusive and treat everyone with fairness and kindness.
- We are courteous in our interactions and ensure everyone's voice is heard.

INTEGRITY

- We are professional, open and committed to doing what we say we will do.
- We are true to ourselves and others

COLLABORATION

- We work together by sharing skills, expertise and knowledge to achieve a common goal.
- We break down barriers and create a sense of community.

4.1 The role of the Chair

As defined in [Lucid Meeting's glossary for the role of the Chair](#): "The Chair is responsible for driving the meeting content. The Chair leads preparation of the meeting agenda, opens the meeting, and works to keep the conversation focused, engaging, and balanced. The Chair is also responsible for managing the formal business of the meeting, such as recognising speakers and handling motions. The Chair may act as the meeting facilitator or may participate as an active contributor when joined by a dedicated facilitator".

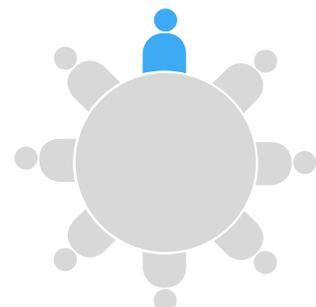
A strong Chair is fundamental to a successful meeting. The role can be quite demanding and not everyone is a natural. However, there are core skills that can be built on to become successful in the role of a Chair. These include:

- Active listening
- Assertiveness
- Impartiality
- Conciseness
- Diplomacy
- Attentiveness

! **NOTE:** *This is not an exhaustive list, there are other qualities and skills needed, [DIY Committee Guide](#) explores this in more detail.*

“ A meeting is only as good as the Chair. ”

– Focus group attendee



Training

There are many training resources available at the University and via our access to LinkedIn Learning where you can build on and develop these skills:

- **PPD Online Modules**

- [Communicating Assertively: Online](#)
- [Managing Challenging Conversations: Online](#)
- [Presentation Skills: Online](#)

- **LinkedIn Learning**

- [Active Listening](#) (this is aimed at coaching and developing employees, but the same principles apply)
- [Active Listening](#) (from the course Facilitation Skills for Managers and Leaders)

- **Open Learn**

- [Facilitating Group Discussions](#)
- [Dealing with Difficulties in Meetings](#)

Observing meetings that are run by strong Chairs is another good way to get ideas. Follow this up by practising and applying these approaches in small and more informal meetings to begin with.

Using the skills noted above, the role of the Chair is to make sure the meeting is purposeful and everything necessary has been discussed. This discussion needs to allow everyone the opportunity to participate and share their views, while also ensuring progress is made through clear decisions and actions. It is important as the Chair that you are attentive, address attendees by name and observe who has not had chance to contribute. As Chair you need to assist people in having the confidence to actively participate.



Idea

Ask your manager if you could rotate the Chair at team meetings to give everyone the opportunity to develop their chairing skills. Make sure it is agreed at the end of each meeting who will be the Chair for the next meeting so they can prepare.



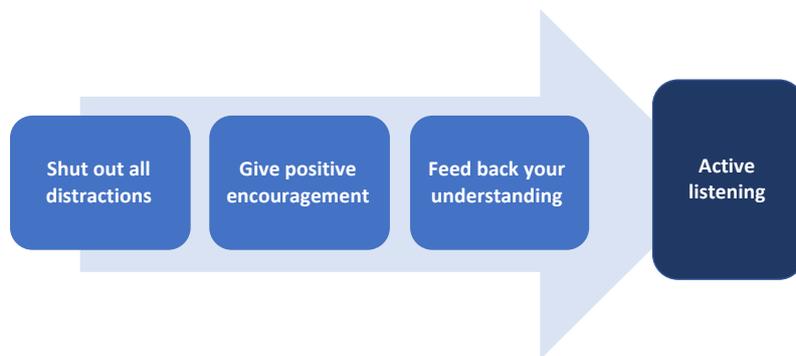
ACTIVE LISTENING is one of the most important skills of a Chair. This involves giving your full attention to the person speaking, their tone and body language, as well as remaining attentive to what is being said regardless of any distractions. Signs of being attentive and showing that you are listening to what is being said are the use of facial expressions, such as a smile, and the nodding of your head. You can also verbalise with utterances such as 'Ok'. Your behaviour as the Chair has an influence on attendee's behaviour, so if you are fully engaged with whoever is speaking then the other attendees will be too. Active listening also makes the person talking feel that their contribution is valued.



IMPARTIALITY is vital and you should never use your role as a Chair to put your views above anyone else's or dominate the discussions.

Three of the core skills listed above – **assertiveness, conciseness** and **diplomacy** – are key to knowing when and how to stop a discussion that needs to be dealt with outside the meeting, to get the discussions back on track and follow the structure outlined in the agenda. This means being strict with timings when people are presenting or discussing an item, and not being afraid to stop people when their time is up in order to ensure that the meeting runs to time.

Let's look at the role in more detail, in relation to the three stages of a meeting: before, during and after.



BEFORE THE MEETING

Preparation is essential for running an effective meeting and the key here is to make sure you have the *right type of meeting* with the *right people involved*.

The first step is to determine the aims and purpose of the meeting and be clear about what needs to be achieved. As part of this you need to determine the structure of the meeting by asking questions such as:

What outcome do you want from the meeting?

What is the goal for this meeting? What do you need to happen as an outcome from the meeting? For example, it could be to sign-off a project plan, allocate resource to tasks, get a clear understanding of something, provide an update or generate ideas.

Do you need to gather any information ahead of the meeting?

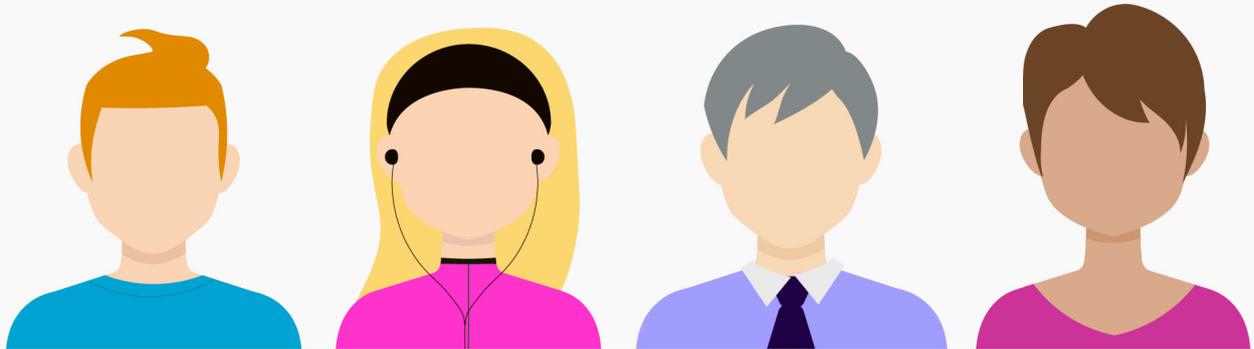
Do you have all of the facts and core information to confidently run the meeting? This could be timelines/deadlines for a project or financial information such as available budget. It could also be an understanding of key stakeholders and those who will be directly impacted by any decisions made.

Do you need to invite any guest speakers?

Is there the need for a subject matter expert (SME) or someone who has an in-depth understanding of a key element related to any of the agenda items in the meeting? For example, HR issues, financial information or technical knowledge.

Who needs to attend the meeting?

You need to ensure everyone who is invited has an obvious purpose for attending and that it is made clear to them the role and area they are representing (this includes the Secretary / minute taker). If the meeting involves a project or piece of work with identified stakeholders, consider who from them needs to be invited to the meeting and what their role is.



It is tempting to be too inclusive with your meeting and invite all relevant parties. However, it is more productive and efficient to invite only key individuals. Ensure that they have an assigned role which progresses the aims and objectives of the meeting. The most productive meetings tend to have fewer than [eight people](#).

Consider your attendees and their interest/views on the meeting subject matter. If you anticipate any challenging conversations or conflict of opinions it might be beneficial to contact the individual before the meeting – have a discussion, emphasising that their views are important, but re-iterating the aims of the meeting and what you are there to achieve.

The second step is to determine when you should hold the meeting, how long it should be and what the most suitable format would be. As part of this you need to determine the logistics and practicalities of the meeting by asking questions such as:

Is there enough time to prepare for the meeting?

Depending on the aims of the meeting, you will need to make sure you have allocated another time to prepare for the meeting when setting a date. For example, if the aim of the meeting is to brainstorm an idea it is likely to take less preparation than one which aims to review and sign off key documents. It is also important that you have given attendees enough time to prepare for, and complete, any pre-meeting work that needs to be done.

How long should the meeting be?

Try to avoid booking in a meeting that lasts longer than an hour, and ideally no longer than 45 minutes. [Research](#) has shown that engagement and concentration in meetings tends to reduce after 30 minutes and attention levels drop quickly the longer the meeting lasts.



Can the meeting take place using a video call?

Given the current context it is likely that the meeting will take place remotely. Whilst there are many options for hosting online meetings, this toolkit will focus on Microsoft Teams as the University's preferred platform. Please also see AbilityNets recording on '[How to Run Accessible Online Meetings for disabled people working and studying from home](#)'.

Online meetings come with lots of positive elements, but require additional preparation and guidance to help make them successful.

If in person, is the meeting room audio visual (A/V) equipment already set up?

If the meeting is held face-to-face consider the location of meeting, the environment itself (is it well ventilated, low noise level etc.) and whether the room has audio visual capacity. The Disability Resource Centre (DRC) have created a [building access guide](#) for students, staff and visitors.

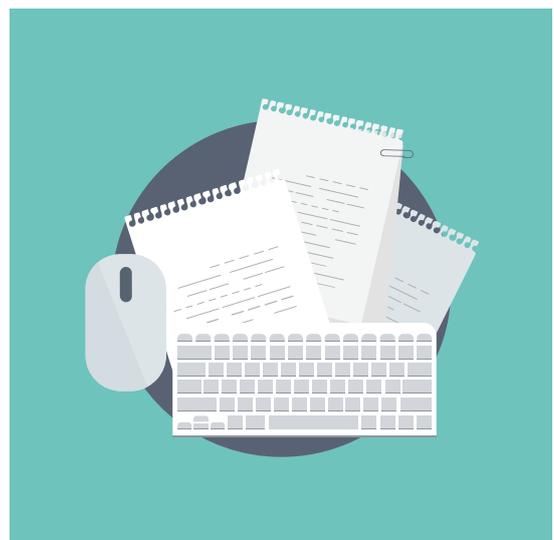
Will a hybrid meeting be required?

It is likely that as we start to return to work, hybrid meetings will become more common, where some attendees are face-to-face and some dial in online. See the [hybrid meeting](#) section of the toolkit for some top tips on running hybrid meetings.

MEETING PAPERS

As discussed, every meeting, regardless of the level or degree of complexity, should have a clear objective and set of aims for what it is there to accomplish. For a more senior, recurring meeting this could include a work plan for the year, detailing the meeting dates and the purpose of each meeting, and Terms of Reference (ToR). Typically, a ToR is a written road map for the committee and contains clear and specific information on how the committee is organised, what the committee is trying to achieve, who the members are, and when and where they meet. A clear and understandable ToR is the first step to a successful committee. This helps to guide the agenda and any accompanying papers that need to be produced.

Once you have the answers to the above questions the next step is to set out an agenda. One common response when asking University staff what makes an effective meeting was a well-structured and timed agenda.



An effective agenda should:

Aims and Objectives

Include the aims and objectives of the meeting so all attendees are clear about what the meeting is there to achieve, and how they can help achieve it.

Purpose

Outline for each agenda item if the purpose is to share information, make a decision, or have a discussion (when the decision will be made at a later date).

Input

Include input from those you have asked to attend the meeting. Seek their guidance for any items they would like to include or raise. If you have decided not to include them in the agenda explain your reasons why, and any future steps to the individual, in advance of the meeting.

Time

Allocate a time for each agenda item, being aware of the overall meeting length.

Who

Identify who is responsible for leading on each agenda item and make sure they are happy to do this before sending out the agenda.

AOB

Conclude the agenda with Any Other Business (AOB) and ask attendees for this information before the meeting. It may be that an item raised as an AOB warrants being a main agenda item at the scheduled meeting, or at a future meeting date.

Circulate

Be sure to circulate the agenda and any associated papers in advance of the meeting – ideally a week before the meeting date. This is particularly important if attendees are being asked to read through and prepare any work before the meeting. Make sure you also allocate time to read through all the papers and are able to answer any questions that might arise from them. It is recommended to keep the amount of pre-reading to a minimum and to include an executive summary.

Accessibility

It is important to make sure the format chosen is accessible, for example Word documents are very compatible with assistive technology. The Disability Resource Centre (DRC) has created guidance for [creating accessible materials](#) for students which is also very applicable to staff.

Visible

Finally, make sure the agenda is visible and referred back to throughout the meeting.

Templates

Please see the appendix section of the toolkit for a series of template agendas.



Idea

Try using a **PATIO** agenda (Purpose, Agenda, Timing, Information, Outcome for each agenda item).

The agenda and any associated papers should be concise in length to encourage all relevant individuals to read the content. If it is not possible to incorporate all the content within the first few pages, you could include the key points that warrant discussion or decision making (and must be read before the meeting), and assign the remaining content to an annex.

While papers proposing open discussion can be a valuable way of eliciting feedback or new ideas, committees needing to take decisions may benefit from papers that make a clear and well-evidenced recommendation. This allows the committee to draw on the expertise of those individuals who have researched and written the paper as a basis for constructive challenge, discussion and decision.

Finally, other practical considerations you need to think about are:

How will the outcome and actions from the meeting be followed-up?

As previously mentioned, a colleague should be assigned to writing up the notes and actions from the meeting, but how will they be followed up? Will those assigned to the action be responsible for reporting back to the Chair that the action has been completed? If so, let attendees know this so they can report back in a timely manner.

What technology will be needed to meet the aims of the meeting?

If the meeting is to be held remotely consider the technology that will be needed to meet the aims and objective of the meeting. If the meeting involves brainstorming ideas, for example, it may be that [Miro](#) is the best software to facilitate this. Miro is a virtual whiteboard tool which can be used to capture ideas and content in meetings and workshop formats. It is available free using an education license. Our colleagues in UIS have created a great [video](#) on getting started with Miro.

Are you familiar with the software?

Make sure you are familiar with the software and any of its features before the meeting. It may be worth holding a practice session with colleagues to run through the agenda and answer any issues that may arise.

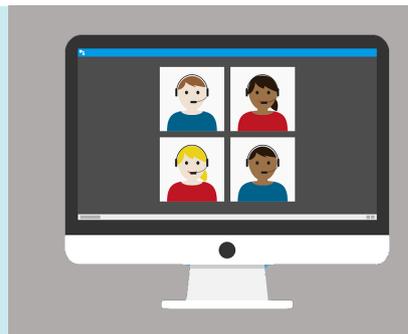
Scheduling the meeting

As the Chair you might need to schedule the meeting, or if you have a Secretary for the meeting, they can be responsible for this as part of their role. Our colleagues in the 'Leadership Community of Practice' have included [eight simple top tips to help when scheduling meetings](#).

DURING THE MEETING

Introductions

Start the meeting with introductions to make sure everyone knows each other and which area they are representing. This should be followed by an opening introduction to the purpose and objectives of the meeting.



Etiquette

You should establish the meeting etiquette so everyone is clear on the 'ground rules'. This should include what the protocol for speaking is – should attendees raise their hand and speak through the Chair? And, is this accepted during items or should they wait until the end of each before asking questions or contributing their thoughts? It should also be made clear that all views should be respected and people should not talk over each or interrupt each other (unless as the Chair you need to direct people back to the agenda or wrap up an item due to timings). Different sizes and formalities of meetings will suit different rules, but as Chair it is your role to communicate what these are for your meeting at the start.



Key tasks

During the meeting, as the Chair, you need to focus on the following tasks:

1. Working through the agenda, keeping to the allocated timings and helping facilitate decision-making

- Briefly introduce each agenda item and explain what the objective for each item is.
- Make sure everyone understands what you are talking about and try to avoid using acronyms and overly technical language. Using plain English (without the use of idioms) where possible is really beneficial as it ensures everyone has the same understanding and also helps non-native speakers.
- Make sure you can see a clock so you can keep an eye on the time and wrap up each agenda item in the allocated timings documented on the agenda.
- Keep everyone on track – if people's discussions start to veer off-track do not be afraid to pick them up on it.

When there is a lot of discussion it can sometimes be hard to pin down a decision. As Chair it is your responsibility to help decisions be reached. If there are conflicting points of view you could present a summary of each and open up a vote, or continue to facilitate a discussion to reach a compromise or alternative solution.

At the end of each agenda item, provide a short summary and highlight any decisions made so everyone is clear and there is no room for ambiguity or misinterpretation. Clearly outline any actions that are necessary, who they have been assigned to and what the deadlines are. After summarising and before moving on to the next item, a good Chair will quietly check with the minute taker that they have all the information they need. This could be a quick visual check to see if the minute taker is looking relaxed and confident.



Idea

You could try a 'car park' approach where any discussions that are off-track are noted for future or offline conversations so they don't get lost or forgotten.

2. Making sure everyone is actively involved and nobody is dominating the meeting

You need to make sure that everyone is given equal opportunity to voice their thoughts and opinions. If a lot of people want to speak in relation to an item make sure you note an order based on when they raised their hand or used whichever cue you agreed for the meeting etiquette at the start. This will avoid people talking over each other as well as ensuring individuals do not dominate or talk for too long. If there are quieter, less confident members of the group you could give preference to them on the occasions they show they would like to raise a point. Alternatively, you could use the format of going around the table.

Naturally, there can be disagreements on views but you should allow an open and respectful environment where people can have a healthy debate, where different opinions are openly listened to and constructive decisions can be made with an understanding of all elements and perspectives.

3. Managing contributions

Unfortunately, at some point in your role as a Chair you will have to deal with difficult people, whether it's someone being obstructive, overly negative or intimidating those with differing views.

There is no easy way to deal with this, but there are a few tactics you can try:

- Reiterate the meeting rules and their alignment to the professional services values (Trust, Respect, Integrity and Collaboration). Ensure it is made clear to the offending person that it is felt their actions are not aligned to the expected standard of behaviour of University staff.
- Be firm and do not let people get away with bad behaviour.
- If someone is being very negative or dismissive you could try switching the focus on to them to suggest what their solution or approach would be.
- Follow up with individuals after the meeting, give feedback about the impact of their behaviour and clarify how you would like the meeting to go next time.

AFTER THE MEETING

Ensure any minutes/notes including actions and any additional information are circulated promptly.

Reflect on how the meeting went:

- What worked well?
- What did not work so well?
- Were the right people in attendance?

Use these reflections to make improvements for the next meeting. You could ask also attendees for their feedback. If you use a 'car park' review the items captured and decide which items would benefit from further exploration. Where appropriate, start planning for the next meeting.

Insights

We asked some of our senior colleagues for their top tips in successful chairing:

“Be well prepared – read all the papers.

Be clear in your mind whether items are for information, decision or discussion.

Be there before the scheduled start time if possible, and don't be flustered or rushed. To be late is, I think, very rude and shows a lack of concern for the time that is wasted and carries an implication that you are busier and your time matters more than that of others.

Try to ensure everyone is engaged. Bring people in if they haven't contributed. Courteously bring people to a halt if they are repeating themselves, or dominating the conversation.

Do not dominate the discussion, or talk for too long yourself.

If discussion is going round in circles bring it to a close.

Be cautious about repeating and reframing other people's contributions and stating what decisions have been made – this can be very useful but also can be boring and repetitive.

Make sure the meeting finishes within the scheduled time.

Ensure that minutes are succinct, correct them rapidly and circulate them soon afterwards.”

**Prof Patrick Maxwell,
Regius Professor of Physic
& Head of the School of
Clinical Medicine**

“Do your homework beforehand and know the agenda well; make sure that you've read all the papers and think about matters ahead of time.

Contact people beforehand if you anticipate difficulties from any particular direction – have a discussion with people, emphasise that their views are important, but ultimately emphasise the aim of the meeting will be to seek a resolution, if not a consensus.

Know who is coming to the meeting and what their roles are – and get people to introduce themselves if the committee/group has not met for a while.

Be inclusive – invite people to speak by name. Make clear any time constraints – and aim to finish two or three minutes before the timetabled end.”

**Prof Loraine Gelsthorpe,
Director of the Institute of
Criminology**

“Create an environment within which members of the meeting feel free to speak and then encourage them to speak within that environment.

Try to summarise each agenda point by drawing together the main comments and conclusions made to that item before moving onto the next item.

Finish the meeting on time other than in exceptional circumstances. Notify the members of the meeting that the meeting is likely to overrun as early in the meeting as possible, if this is the case.

Acknowledge both the significance of the work of the meeting, the importance of the contribution of its members and the overall impact of the work.”

**Prof David Cardwell,
Pro-Vice-Chancellor
(Strategy and Planning)**

4.2 The role of the Secretary/minute taker

It really depends on the meeting type and formality to whether a full Secretary role is required, or whether it is sufficient to have a nominated person to take minutes or notes at a meeting. This section will predominately focus on the role of a minute / note taker.

The purpose of minutes is to capture what was discussed, and more importantly, what was agreed at a meeting.

The skills that will help you be an effective note-taker include:

- Good listening skills
- Good written communication skills
- Attention to detail
- IT skills



Training

To help you fine-tune your notetaking skills, there are training resources available at the University and via our access to LinkedIn Learning:

- PPD courses and training:
 - [Minute Taking: An Introduction: Online](#)
 - [Administrator Development Programme](#) (includes content on managing meetings)
- LinkedIn Learning:
 - [Taking Minutes](#)

BEFORE THE MEETING

It is important you are clear on what types of minutes / notes are required for each meeting you are assigned to. It is not always necessary to take full formal minutes; sometimes it is perfectly acceptable to take notes in a more informal bulleted note form or even to strip things right back and just record the actions and decisions.

Decide what method you will use to take notes – it is fine to use a physical notepad and pen but using Word or Word online (Microsoft 365) could save you time if you are confident with your typing skills. Microsoft Teams does have a [Meeting Notes function](#) which can be accessed through the meeting chat space.

Familiarise yourself with the agenda and any notes / minutes from previous meetings in the series.

Chair briefing meeting

In your role as Secretary, you may be required to hold a separate briefing meeting with the Chair in advance of the formal meeting. This provides the opportunity to go through the agenda, key speaking points and the aim(s) of the meeting. It might be that a separate Chair's agenda is produced, which contains detailed speaking points, actions and aims for each agenda item. During the meeting the Chair is also able to ask any questions they may have and discuss any accompanying papers.

DURING THE MEETING

Cross-reference the list of people invited so you can make sure you note who is in attendance and who is not. Do not be afraid to ask for people's names if you are not sure who's who.

If you are not clear on any decisions made do not be afraid to get clarity from the Chair. Do not be afraid to point out if people are talking over each other and stress how difficult it is to take minutes in that situation.

If part of the meeting is a run through of a presentation you do not need to make notes on this as you can circulate the slides for reference alongside the minutes / notes.

FOLLOWING THE MEETING

It is important to make sure the typed-up minutes / notes for circulation are written in simple, plain English.

Make sure for the actions logged that each item has an owner and a timescale.

Ensure the minutes / notes are circulated as soon as possible after the meeting – tidying up or typing up notes the same day as the meeting will ensure the conversations are fresh in your mind.

It is essential to make sure you have sent them to the Chair first for their approval. Remember also to send them to those who were invited but unable to attend the meeting as they will help to keep those members informed.



You could record the meeting – this is easy to do if your meeting is remote as [Microsoft Teams](#) has this functionality. However, you can use a mobile phone or laptop to record the audio of a face-to-face meeting too. There are some tools that record the audio and automate a transcript, an example of this is [Otter](#). You should always make sure all attendees consent to the meeting being recorded and make sure it is clear what the recordings will be used for. If it is just for your own reference to help with production of the minutes, you will find most people are fine with this.

4.3 The role of the attendees

As a meeting attendee you have a really important role in the effectiveness of the meeting. Attendees are accountable for participating and contributing to the meeting. If you prepare and actively participate, your contribution can be invaluable. The skills that will help you participate effectively include:

- Time management
- Effective communication
- Active listening
- Presentation skills

Training

There are many training resources available at the University and via our access to LinkedIn Learning where you can build on and develop these skills:

- PPD Online Modules:
 - [Time Management](#)
 - [Communication Essentials](#)
 - [Presentation Skills](#)
- LinkedIn Learning:
 - [Active Listening](#) (this is aimed at coaching and developing employees, but the same principles apply)
 - [Active Listening](#) (from the course Facilitation Skills for Managers and Leaders)
- Open Learn
 - [Participating in Meetings](#)

BEFORE THE MEETING

If you are unable to attend the meeting, give apologies with good notice.

If you would like to add any other business (AOB) items you should send these to the Chair at least 24 hours in advance of the meeting.

Make sure you know why you have been invited to the meeting and what your role at the meeting will be. Are you bringing specialist knowledge? Are you representing your job role? Are you representing your department? If you have any uncertainty to why you have been invited contact the meeting organiser for clarification.

Read the papers before the meeting and make notes of any key points that you would like to contribute. If you are representing your department, make sure you have their views to ensure you are representing them accurately. Come prepared with any questions you may have or points you wish to be explained.

If possible, allocate 15 minutes in your calendar before the start of the meeting to mentally prepare for the meeting content. Make sure you have the agenda and any papers easily accessible, and are able to refer back to them during the meeting.

If the meeting is face-to-face find out the where the meeting is being held and plan your journey to the location (factoring in extra time for any transport issues or other unplanned delays). If the meeting is being held virtually make sure you have access to the meeting software and are familiar with its features.

DURING THE MEETING

Arrive at the meeting promptly, ideally arrive a few minutes early. If you are late not only will you miss the introductions and context you will also disrupt other people.

Make sure you understand the agreed meeting etiquette and follow it throughout the meeting.

Don't check your emails or messages during the meeting, make sure you are fully engaged and not distracted.

Don't be afraid to contribute. Keeping ideas to yourself can be a real loss. Remember, no idea is a bad idea!

When contributing make sure your comments are clear, concise and remain relevant to the specific agenda items. When you have finished allow other attendees the opportunity to ask questions for clarification.

Make sure you demonstrate your active listening skills and fully engage with each person when they are speaking.

Treat all other attendees with respect even if they have differing views. It is good to have an open debate and have an opportunity to look at things from another perspective.

Don't take on actions that you are realistically unable to complete, whether due to timescales or tasks beyond your ability.

FOLLOWING THE MEETING

Make sure you are clear on any actions that have been assigned to you and know what the deadlines are. Once you have completed your actions, let the Chair know. If anything has worked particularly well, or not so well, do let the Chair know your feedback so they can improve future meetings.



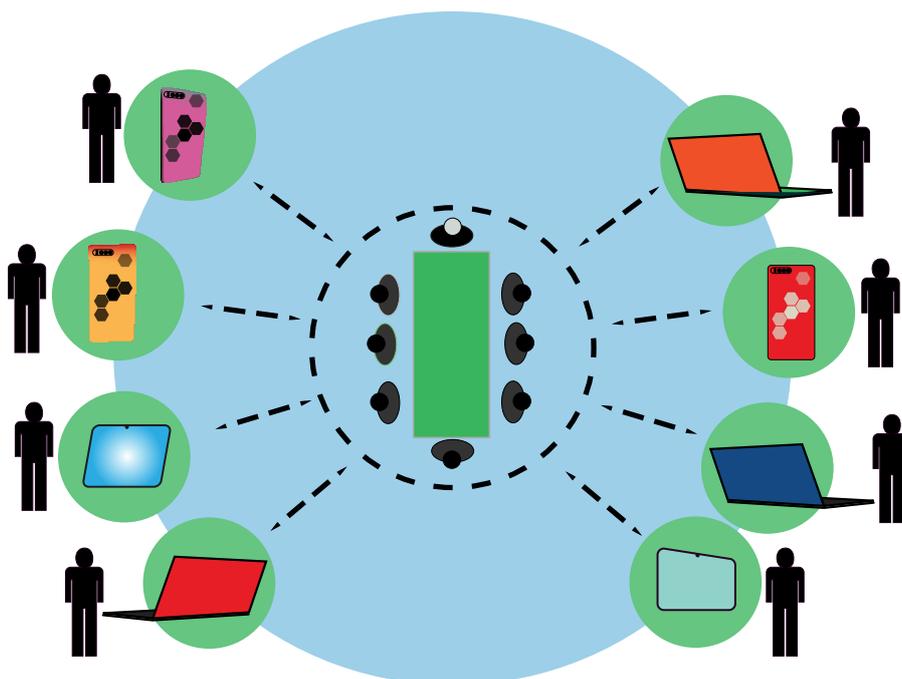
5. HYBRID MEETINGS

A hybrid meeting can be described as taking place when some attendees join in person and some participate remotely. This may be something that occurs more frequently within the University as we adapt to the new working environment and have increased access to collaboration technologies, e.g. Microsoft Teams.

If you can, it is best that all attendees join the meeting either remotely or in person. Some organisations use the phrase “[one remote, all remote](#)”. If one person is attending remotely, those in the office should all connect online using separate devices (in a quiet environment). This means that everyone has the same experience, and all are equally encouraged and able to participate. If you are unable to do this, ensure you consider the following criteria:

1. Engagement

- How will you keep remote attendees engaged in a hybrid meeting? The items discussed around general meeting engagement are even more important in this meeting type. Consider how you will manage questions and participation in a hybrid meeting. It is a good idea to alternate and take one question from those online and one from those in the room, to ensure equal weight is given to all members of the meeting.
- Assign a colleague to monitor the online tool to see if the people who are dialling in remotely are trying to contribute. For instance, if you are using Microsoft Teams, you will need to see if someone is using the Raise Hand or Chat functions to make a comment or ask a question.
- Avoid using phrases like “Does anyone online have any comments?” as these will often result in silence - instead encourage people to contribute by name or by asking a specific question.
- If possible, allocate an ‘in the room contact’ to each remote participant, whose role is to ensure they are involved and heard in the meeting. This should help the online attendees remain engaged, while also developing team relationships.
- The professional services values – trust, respect, integrity and collaboration – are even more important in hybrid meetings. Respect your colleagues, whether they are joining in remotely or in person, and ensure the agreed meeting etiquette is followed.



2. Resources

- It is best practice to share any documents before the meeting, and upload them to the meeting platform. Ensure you reference page numbers when discussing the papers so that those who are not in the room are able to follow the discussion. If circumstances mean you are unable to distribute them in advance, at least one person will need to be dialled into the meeting to share their screen with the people who are working remotely.
- Only share your screen if you need to, otherwise it's better to let your online attendees see you and the other meeting participants.
- If your meeting involves brainstorming ideas, it may be useful for everyone to use a tool such as [Miro](#) so all participants are able to contribute.

3. Visual access

- Ideally, those joining the meeting remotely will be able to see the attendees who are at the meeting in person. If, however, the people dialling in remotely are reliant on audio alone, it is important to consider how you can keep them engaged in this environment.
- You may be in a room which has the technology to display the whole space, so that people dialling in remotely can see what is happening. However, if this is not available, you might want to consider at least one person (probably the Chair) dialling in on their laptop so that remote attendees can see an individual at the meeting.
- If more than one person physically in the room wants to dial in (in the same space), remember that only one audio device should be connected at a time or you will experience feedback.

4. Sound quality

- Often in meetings people will begin to speak over one another in a way that is not distracting to those in person, but is hard to follow when listening in remotely. It can be helpful to say your name before you begin speaking so that those people who are remote know who is talking. If everyone talks at once then it becomes very difficult for remote attendees to follow the conversation.
- Similarly, it might be difficult for everyone in the room to hear someone speaking online if you are reliant on using the speaker function on a phone or using laptop speakers. It may be necessary to make sure there is a speaker available.

6. ONE-TO-ONE MEETINGS

Regular one-to-one meetings are an essential part of building effective working relationships, particularly between managers and individuals in their team. They also form an important part of the ongoing Staff Review and Development (SRD) cycle. They are conversations around what is happening on a day-to-day basis, which can help to motivate and engage employees, and guide them on their personal and professional development journey.

Here are some top tips for having effective one-to-ones:

1. Book regular meeting times in your diaries

One-to-one meetings should be scheduled on a recurring basis. This might be weekly, fortnightly or monthly, but having them as a recurring shows commitment from both parties. It demonstrates that the manager has time dedicated to the individual and enables questions or comments to be raised in a dedicated space, rather than arising on an ad hoc basis.

2. Be prepared

Take time to note down points you'd like raise and discuss in the meeting. This is particularly important for the team member who guides the conversation. It could be that you have a brief standing agenda and bring other items to the discussion as they arise. If you think an item warrants a detailed discussion, or input from other parties, it might be best to raise this in advance of the meeting.

3. Be punctual and try not to cancel at the last minute

Both parties should arrive on time. This demonstrates a commitment to each other and the process as whole. When faced with a large number of regular meetings, it can sometimes feel like cancelling a weekly meeting might give you back some time in your day. However, without a specific time and place for a one-to-one, those items will still need to be addressed and are likely to be raised in another, less efficient and conducive way.

4. Be present

This is a dedicated space so devote your full attention, being aware to remove or mitigate any potential distractions. Make sure your one-to-one occurs in a private space away from the rest of the team. One-to-ones should take place where people do not need to be afraid that they might be overheard. This also encourages engagement and attention to the discussion.

5. Begin with a general check-in

One-to-ones are a conversation, as opposed to a formal meeting. Why not start with a general check in on a more personal level, if this is appropriate for the person (they may not wish to share personal information but you can still ask after their wellbeing). This can help both parties get to know each other and helps the manager understand any factors that might be contributing to the individuals work at a given time.

6. Start (and end) on a positive note

Sharing a success or complimenting them on a particular piece of work is a good way to start a one-to-one as it creates a positive environment for further discussion. In the same way, close the meeting on a positive note. Ending with a note of appreciation and saying 'thank you' can have a big impact. Words of affirmation mean a great deal. You don't have to say something that doesn't feel authentic but you can talk about something they're doing well.

7. Focus on the individual

The team member should lead the conversation and ask questions that will open up the discussion. Remember the one-to-one is a conversation in which any issues with current activity and how to solve them can be raised, as well as talking about progress and development opportunities. The manager needs to strike a balance between asking questions and actively listening to what their team member has to say.

8. Regular review of both short- and long-term objectives

It is important for one-to-ones to consider short-term objectives (priorities for the weeks ahead), but also to find time to consider longer-term objectives. All staff should have an [annual SRD meeting](#) where objectives and a development plan for the year ahead are agreed. When scheduling recurring one-to-ones, it is a good idea to ensure that at least once a term, the subject of the meeting is to revisit the objectives and development plan set at the SRD. It is important to keep objectives [SMART](#), which helps to clarify and record them.

9. Wellbeing

Maintain an open and supportive dialogue around workload and wellbeing. The one-to-one provides the opportunity for regular check-ins – for the team member to raise any concerns, and the manager to ask relevant questions, e.g. how manageable is your workload? There is then space for both parties to work together and discuss practical solutions and any possible training needs, for example, help with prioritisation or delegating work.

10. Manage accountabilities

Make sure the last few minutes of the meeting are assigned to run through what each of you have agreed to do and by when. Put your notes in a central place and re-visit past meetings to check that next steps have been taken. Actions should always be followed up – give yourself a reminder to check in regularly.

Personal and Professional Development (PPD) have a range of short courses and online modules to help both the line manager and team member gain the most from the one-to-ones, including courses focusing on [communication](#), [people development](#) and [relationship building](#).



Top tip

Why not use this [Trello Board template](#) for planning your one-to-ones? This includes content such as team member topics, manager's topics, goals and actions. Both the team member and manager can add to the board before the meeting. This helps guide the discussion and is a great way of assigning and tracking any follow-up actions.

7. USEFUL LINKS AND RESOURCES

Please find below a list of useful links and resources for effective meetings:

Training (University of Cambridge)

- [Administrator Development Programme](#) (includes content on managing meetings)
- Communicating Assertively – [Online](#)
- Communication Essential – [Online](#)
- Giving Effective Feedback – [Online](#)
- [Key Principles of Effective Meetings](#)
- Managing Challenging Conversations – [Online](#)
- Minute Taking – [An Introduction Online](#)
- [Miro](#)

Training (external)

- LinkedIn Learning Path – [UoC: Professional Development – Effective Meetings](#)
- 3C - [How to Manage Conference Calls and Online Meetings](#)
- LinkedIn Learning – [Office 365 for Administrators \(My Analytics\)](#)
- LinkedIn Learning – [Can you accomplish your goal without a meeting?](#)
- LinkedIn Learning – [Outlook Essential Training \(create a meeting\)](#)
- LinkedIn Learning – [Active Listening](#)
- LinkedIn Learning – [Learning Word online \(Microsoft 365\)](#)
- LinkedIn Learning – [Taking Minutes](#)
- Open Learn – [Participating in Meetings](#)
- Open Learn – [Facilitating Group Discussions](#)

Useful links and references (University of Cambridge)

- Leadership Community of Practice – [Eight simple tips for scheduling meetings](#)
- [Microsoft Teams at Cambridge Hub](#)
- Microsoft Teams at Cambridge Hub – [Tips: Meeting Specific Advice for Cambridge](#)
- *ourcambridge* – [A Guide to Online Meetings](#)
- Disability Resource Centre – [Accessible Materials](#)
- Disability Resource Centre – [Building Access Guide](#)

Useful links and references (external)

- AbilityNet – [How to Run Accessible Online Meetings for disabled people working and studying from home](#)
- Collaboration SuperPowers – [Tips for Hybrid Meetings](#)
- Doodle – [The State of Meeting Report 2019](#)
- Free Management Books – [The Skills Required to Chair a Meeting](#)
- Harvard Business Review – [Do You Really Need to Hold That Meeting?](#)
- Harvard Business Review – [The Most Productive Meetings Have Fewer Than 8 People](#)
- Harvard Business Review – [Cancelling One-on-One Meetings Destroys Your Productivity](#)
- HUFFPOST – [We Spend 26 Days A Year In Meetings At Work](#)
- Imperial College London – [Chairing Meetings](#)

- LinkedIn Learning Blog – [The 6 Qualities Meetings Need to Have to Be Effective](#)
- Medium – [The Most Important Question That Will Make Your Meetings Productive](#)
- Meeting King – [How long should a meeting be?](#)
- Microsoft – [MyAnalytics](#)
- Microsoft – [Creating Appointments and Meetings](#)
- MeetingSift – [The Six Most Common Types of Meetings](#)
- OWLLabs – [Use This Meeting Checklist to Decide If a Meeting Is Necessary](#)
- Work Life – [How to run effective meetings, and thrive](#)
- Work Life – [7 Tips for Better 1-on-1 meetings](#)

8. AVAILABLE TOOLS AND TECHNOLOGY

Please see below a summary of the tools and technologies we have mentioned in the guide. These can be useful to help make meetings more effective:

- [Microsoft Teams](#) – for remote meetings, recording meetings and taking notes
- [Miro](#) – a virtual whiteboard used for online brainstorming and ideas sharing
- [Otter](#) – for recording meeting audio and automating a transcript
- [Trello](#) – a tool for managing meetings agendas, notes and allocating and tracking tasks/actions

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