SPARK LEADERSHIP SERIES | PENN STATE

Effective Meetings

Design, Facilitation, and Follow-Through

Pre-reading for Penn State academic administrators

Steven J. Huddart • Greg Filbeck • Valerie Struble

How to use this pre-read

The session is designed so that at least half of our time can be spent on questions, cases, and discussion.

1 Read for the framework

Notice how meeting purpose should determine participants, agenda, process, and record.

2 Choose one challenge

Bring a meeting that is too long, poorly attended, indecisive, contentious, or weak on follow-through.

3 Prepare one question

Where would a change in design, facilitation, procedure, or support make the biggest difference?

Live session emphasis

Brief framing • participant cases • questions • peer exchange

01

DESIGN THE MEETING

Steven J. Huddart

Meeting purpose, format, and operating choices

Read for the ideas. Bring a recurring meeting challenge to the session.

Start with the kind of work the meeting must do

A meeting can contain several item types, but each agenda item should have a primary purpose.

INFORM

Updates, announcements, results

DECIDE

Evaluate alternatives and choose

SOLVE

Diagnose an issue and develop solutions

COORDINATE

Align interdependent work

PLAN

Set goals, priorities, timelines, resources

GOVERN

Provide oversight, accountability, compliance

DEVELOP

Build knowledge, skills, relationships, culture

Design backward from the required outcome

Purpose determines both what happens in the room and what evidence must remain afterward.

PURPOSE

Input to a decision maker
Formal decision with vote and rationale
Broad information sharing
Confidential fact finding
Knowledge and community building

DESIGN CHOICES

In person, online, or hybrid
Formal or informal
Who attends and in what role
How decisions are made
Meeting tempo

RECORD & CONTINUITY

Minutes or decision record
Who captures and approves
When the record is distributed
How unfinished items are handled
What remains confidential

Make the operating choices explicit

Predictability reduces administrative friction and helps participants prepare for the right kind of contribution.

1. **How are agenda items added?**
2. **When will materials be available?**
3. **Who attends, advises, and decides?**
4. **How will decisions be made?**
5. **Who records minutes or decisions?**
6. **How are unfinished items resolved?**

Baseline practices: solicit items in advance • distribute agenda and materials early • start on time • end early when possible • distribute minutes promptly

02

LEAD THE MEETING

Greg Filbeck

Purposeful agendas, fair facilitation, and parliamentary clarity

Read for the ideas. Bring a recurring meeting challenge to the session.

Define success before sending the invitation

A useful agenda names the outcome, the people needed, and the expected product.

PURPOSE

What must be decided, solved, or coordinated? Write one outcome sentence.

PEOPLE

Invite decision makers and people with essential information. Clarify who votes and who advises.

OUTPUT

Finish with a decision record, action owners, and due dates. Use a written update when discussion adds little.

For each agenda item: owner • purpose • proposed time • inform / discuss / recommend / decide

Open with clarity; facilitate with fairness

The chair protects both the work and participants' opportunity to contribute.

ESTABLISH READINESS

Call to order
Confirm quorum
Approve minutes
Adopt the agenda as appropriate

MANAGE THE FLOOR

State the pending question
Recognize speakers fairly
Keep remarks relevant
Address remarks through the chair

KEEP PEOPLE ENGAGED

Invite new voices
Summarize neutrally
Display exact wording
Make the next step visible

Move from an idea to a decision

In formal settings, a visible sequence prevents confusion about what is pending and what has been decided.



Three common corrections

NOT “TABLE UNTIL NEXT MONTH”

Use postpone to a certain time for a scheduled delay.

NOT “QUESTION!”

Closing debate requires the applicable formal process – Previous Question – and 2/3 vote

NOT “FRIENDLY AMENDMENT”

Once stated, changes require assembly approval.

Design for different participation needs

Offer multiple ways to engage without labeling participants or inferring preferences.

BEFORE

Send the agenda and pre-read early. State the question and evidence needed.

DURING

Pause for silent reflection. Invite useful disagreement. Make the speaker queue visible.

HYBRID

Repeat room comments into the microphone. Display exact proposals and next steps.

When discussion gets difficult

- Dominating or off-topic: restate the question and recognize others fairly.
- Disagreement: summarize competing options neutrally and test claims against evidence.
- Confusion or fatigue: display exact wording, invite questions, or use an appropriate recess or referral.

Personality preferences and meeting strategies

Greg Filbeck's MBTI® observations, with facilitation strategies to accommodate different needs

Preference pair	Filbeck's observation	Meeting strategy
Extraversion / Introversion (E / I)	Extraverts need feedback. Introverts benefit from advance preparation and time to respond.	Provide feedback during discussion. Send questions early and pause before inviting responses.
Sensing / Intuition (S / N)	Intuitives generate ideas. Sensors help operationalize them but may seem dismissive of the idea generating process.	Separate idea generation from evaluation. Then invite concrete implementation steps and constraints.
Thinking / Feeling (T / F)	Thinkers emphasize fairness. Feelers emphasize harmony.	Use clear, consistent criteria. Invite concerns about the impact on people and relationships.
Judging / Perceiving (J / P)	Judgers may rush to closure. Perceivers may struggle to close.	Set time for exploration and a clear decision point. Check readiness, then confirm the next step.

Ask what helps each person participate. Offer these supports to everyone without labels or required type disclosure.

03

ENABLE THE MEETING

Valerie Struble

The repeatable work before, during, and after the meeting

Read for the ideas. Bring a recurring meeting challenge to the session.

Plan the year, not just the next meeting

A predictable tempo creates preparation time and reduces repeated scheduling work.

YEARLY

Confirm the meeting pattern
Review dates and deadlines
Send calendar invitations

RECURRING

Use calendar reminders
Trigger monthly preparation
Keep the process consistent

TWO WEEKS

Request agenda items
Gather supporting materials
Review with the chair

WEEK OF

Finalize one packet
Flag presenters and decisions
Confirm technology

Build one organized packet

The goal is that no one sees the agenda, the decision, or the supporting evidence for the first time in the meeting.

CALL FOR ITEMS

Ask members to submit topics, decisions, updates, and supporting documents.

LEADER REVIEW

Clarify purpose, order, ownership, time needed, and the expected outcome.

PACKET DESIGN

Combine and label attachments in agenda order. Flag decisions, presenters, and pre-reading.

Confirm the Zoom link, settings, accessibility needs, and presenter readiness.

Stay one step ahead, then close the loop

Meeting support protects the leader's attention and turns discussion into a usable record.

BEFORE START

Open materials
Confirm technology
Verify presenters
Prepare note-taking tools

IN THE ROOM

Track agenda flow
Surface documents
Note decisions
Clarify owners and deadlines
Capture parking-lot items

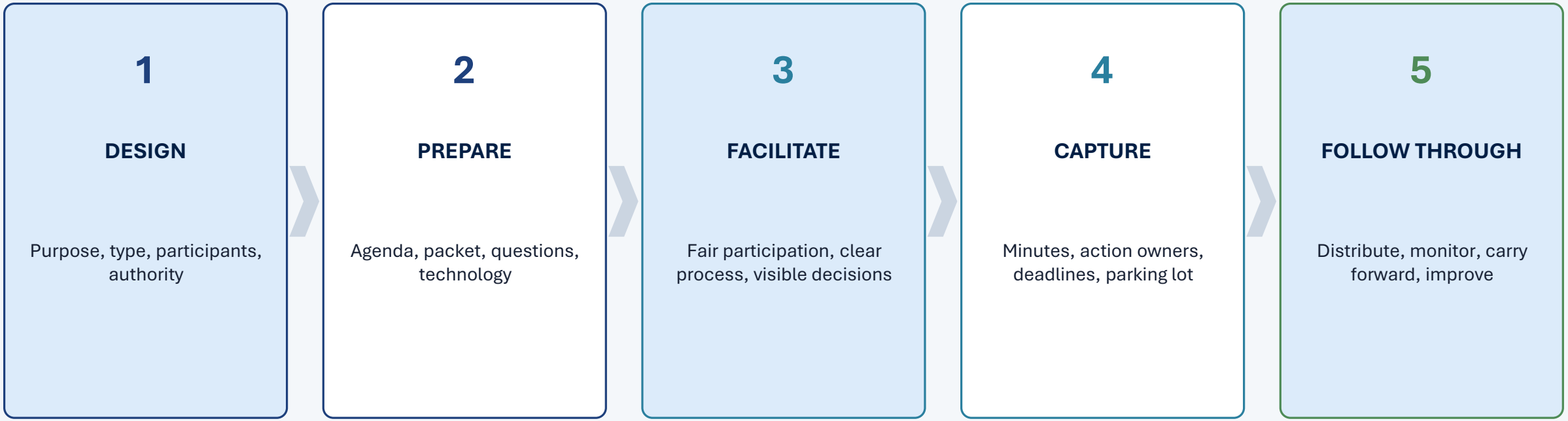
AFTER

Use AI notes only as a starting point
Verify against agenda and notes
Distinguish decision from discussion
Distribute approved minutes and follow-up

The meeting is not finished until the follow-up is clear.

One meeting, one coherent operating cycle

The presenters' advice fits together as a single sequence.



A strong meeting is not simply well chaired. It is intentionally designed, administratively enabled, procedurally clear, and completed through follow-through.

Questions and discussion

Use the session to work on real meeting challenges, not to repeat the pre-read.

PURPOSE

Which recurring meeting should be shorter, replaced with a written update, or redesigned around a clearer outcome?

PARTICIPATION

Whose voice is missing, overrepresented, or difficult to include effectively?

DECISION

Where do unclear authority, voting rules, or motion wording create friction?

FOLLOW-THROUGH

Which decisions, owners, or deadlines routinely disappear after adjournment?

Bring one meeting. Leave with one change to test.

OPTIONAL REFERENCE

Parliamentary Quick Reference

Use where Robert’s Rules is the adopted authority.

Privileged motions: ranks 1–5

Higher-precedence motions are handled before lower-precedence motions when otherwise in order.

Rank	Motion	Purpose	Debate?	Handling
1	Fix time to which to adjourn	Set an adjourned meeting to continue the session	No	Second; majority
2	Adjourn	End the current meeting	No	Second; majority
3	Recess	Take a short break	No	Second; majority
4	Question of privilege	Address urgent rights, comfort, or participation	No	Chair rules
5	Orders of the day	Return to adopted order of business	No	Enforce order

Ranking describes precedence, not importance; incidental motions are outside this list.

Subsidiary motions: ranks 6–9

Higher-precedence motions are handled before lower-precedence motions when otherwise in order.

Rank	Motion	Purpose	Debate?	Vote
6	Lay on the table	Set aside temporarily for urgent business	No	Majority
7	Previous question	Close debate and proceed to vote	No	Two-thirds
8	Limit or extend debate	Change speech or debate limits	No	Two-thirds
9	Postpone to a certain time	Schedule consideration for a definite later time	Limited	Majority*

** Creating a special order requires two-thirds.*

Subsidiary and main motions: ranks 10–13

Higher-precedence motions are handled before lower-precedence motions when otherwise in order.

Rank	Motion	Purpose	Debate?	Vote
10	Commit or refer	Send the matter to a committee	Limited	Majority
11	Amend	Change wording of a pending motion	Usually	Majority
12	Postpone indefinitely	Dispose of main motion for this session	Yes	Majority
13	Main motion	Introduce a proposal for action	Yes	Majority

Specify a committee's task and reporting deadline when referring a matter.