

Leading Boards Facilitate Effective Meetings

Use this tool to learn facilitation strategies for leading inclusive meetings.



This tool is part of the Inclusive Boards Playbooks. In collaboration with directors, national organizations, and leading thinkers, we have compiled these practices and tools to assess your board's practices and activities to create a leading board culture. For the complete playbook, go to inclusiveboards.stanford.edu.

INSTRUCTIONS

- Identify opportunities for growth and areas of strength for your board using the table on page 1.
- For further details and actionable items, refer to pages 2-4 with additional director-sourced and research-backed strategies and tips.

All directors can play a decisive role in shaping an inclusive and high-performing board. Successful board leaders are often also seasoned facilitators who take time to audit meeting practices to learn pain points, intervene early, and build resilient boards that can thrive despite adversity. A strong facilitator leverages the expertise of the group, drawing various perspectives to address critical issues.

Self-Evaluation: Meeting Practices

Check if you regularly practice inclusive behaviors during meetings.

Does your board:	Never			Always	To learn more, go to strategy:
Set the tone and set expectations at the start of the board or committee meeting.	1	2	3	4 5	<u>1</u>
Solicit views of members , including those who have not shared or may have opposing views.	1	2	3	4 5	<u>2</u>
Role model inclusive behaviors , including deep listening, acknowledging and valuing differences, and respect.	1	2	3	4 5	<u>2, 3</u>
Actively facilitate so that no members dominate and the room is safe to express different ideas.	1	2	3	4 5	<u>3</u>
Use time between meetings to solicit input , set expectations and prepare members to participate effectively.	1	2	3	4 5	<u>4</u>

Key: 1 = Never, 2 = Rarely, 3 = Sometimes, 4 = Very Often, 5 = Always

Strategies for Facilitating Effective Meetings

These ideas are gathered from board members who practice, and recognize the value of, effective facilitation.

1 Set the tone

Lay a solid foundation for how the board is to engage so that everyone is on the same page.

- Reaffirm common interests:** Input is in service of the organization.
- Establish a no-judgment zone:** A range of viewpoints are welcome to advance our work. Focus on doing so respectfully.
- Set the narrative so that everyone has the same foundation for the discussion.**
 - Align on key topics before the meeting.
 - Consider including a short letter from the CEO at the top of the board packet.
- Outline how input will be solicited:** Clarify so that everyone is on the same page, even before each section of the agenda. Help people understand how to effectively engage:
 - When will questions be solicited? Will people be invited to speak up or should they offer viewpoints when they have something to add? Are you seeking consenting ideas or oppositional/new ones?
 - Establish that effective discussions drive the business forward by leveraging the diverse expertise of board members.
- When introducing new board members, focus on the expertise they are bringing to the board.** This sets them up for success and can mitigate any uncertainty about why they are here.
 - If you are mid-term, and you wish to re-establish a member's expertise or establish it in an area, you can say, *"I'm so glad you shared with me your experience in _____ (running an initiative, expertise outside of one's title, etc.). Would you comment on our discussion? Your view would be helpful now.*

2 Include everyone's perspective

Facilitate for full and inclusive participation. Upfront, let board members know that you really want to hear from everyone, and that you will be asking each board member to contribute. Don't just put the "newbies" up front, and don't just put the "old-timers" up front. Mix it up, but give people the heads-up to know you are expecting everyone to comment.

- Go around the room.** Try this before making key decisions or to kick off and/or close the meeting.

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- ❑ **Engage members who have not shared their views.** Notice if they need additional time to contemplate before speaking and then ask if they would like to contribute.
- ❑ **Acknowledge the value of listening,** especially if some members dominate the conversation. As examples, you can ask, *“Who has not had a chance to speak yet and has something to ask or add?”* or you can suggest, *“I want to set the stage for people who normally speak a lot to try listening more, and for those who listen a lot, to try speaking.”*
- ❑ **Mix up the seating so hierarchies are not entrenched.** As an example, try seating newer directors next to the CEO, CFO, Chair, or longer-tenured directors. Utilize different physical setups; try a round table to create equal placement for all.

3 Seek different perspectives

Welcome and acknowledge diverse views.

- ❑ **When someone presents a new or oppositional perspective, acknowledge it.** Perhaps probe so that it is better understood. Phrases that can encourage dissent and sharing of different ideas:
 - *“That is an interesting question. Can you share more?”*
 - *“I did not think to ask about that. Thank you.”*
 - *“We came to a consensus rather quickly. Who can point out what we missed?”*
- ❑ **Ask questions beginning with “How can we...?” rather than “Should we...?”** to invite solutions that leverage differences and consider the complexities of issues being discussed.
- ❑ **Use executive sessions to give compliments** to people who have raised difficult questions or probed areas that are often overlooked, like culture. This is validating to the person who spoke up and signals to others that you welcome different perspectives.
- ❑ **Mix up the meeting format.** Experiment with formats to bring out different perspectives, such as:
 - Bring in peer-level external experts to argue an opposite point of view or challenge a board on a difficult topic.
 - Leverage case studies on fictional companies to spark candid discussions and board critical thinking skills.
 - Ask those who are already deeply steeped in the content to hold their views until others have spoken.
 - Assign board/management workgroups on critical topics, where each workgroup can dive deep into a topic and the recommendation, and feedback from the workgroups is then shared.

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4 Engage between meetings

Build confidence and listen for unique contributions.

In one-on-one conversations:

- Pre-meeting call, dinner, or in a Director Teams Group:** Solicit input and set members up to contribute in the meeting.
 - Ask what should be brought up for discussion.
 - Find out what is troubling them or if any concerns are brewing.
- Post-meeting call:** Schedule a debrief to discuss business topics as well as board interactions.
 - Ask about interesting perspectives they shared so you can learn more.
 - Be open to and ask for feedback about how the meeting flow could be improved.
 - Discover any views or topics that were missed in the meeting.
- Make use of an initial [board interview](#)** with new members to discuss working styles and preferences.
 - Ask them what they would like to contribute to the board.
 - Outline effective ways for them to express their ideas.

With the entire board:

- Engage with company executives:** Build relationships between the board and executives.
 - Consider setting up a pre-meeting call with the CEO, even 15 minutes, to ensure they hear the narrative and expectations before the meeting.
 - Set up time to hear from executives in addition to the CEO.



Inclusive Boards
Playbooks

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Strategies in the Inclusive Board Playbook are:

- > Establish Inclusive Norms
- > Facilitate Effective Meetings
- > Build Strong Relationships
- > Mentor New Directors
- > Engage With and Value Differences