

# **Needs Analysis: Improving Meeting Effectiveness**



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**R-621/FA23**

**Due: December 12, 2023**

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# **EXECUTIVE SUMMARY**

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The purpose of this needs analysis is to identify, from an employee's perspective, the most relevant elements that contribute to or detract from the execution of a successful meeting and in an office environment. This needs analysis is intended to serve as the foundation for creating new employee training or updating existing trainings to facilitate and conduct meetings in a more constructive and efficient manner.

## **RESULTS**

The results of this needs analysis show that having a clearly defined agenda is the most valued element for maintaining the focus of a meeting and not letting the conversation drift off topic. The data also supports the idea that the effectiveness of a meeting can be improved when the participants are made aware of the meeting's purpose beforehand.

In terms of considerations that need to be made for a meeting to take place, both employees and managers agreed that variables such as location and access to technology will have an impact as to which participants are able to attend and at what level they are able to contribute to the meeting.

The data regarding elements of a meeting that make it difficult for respondents to participate in resulted in a consensus that meetings which run over their allotted time, do not stick to a pre-approved agenda, and lack of participants with the authority to enact changes where the largest inhibitors of meeting productivity.

## **RECOMMENDATIONS**

Employees require an intervention that will reinforce the awareness of any common attitudes, behaviors, or procedures that may be contributing to or detracting from a meeting's overall success. This intervention may include a training workshop such as the 5 Ps of effective meetings (purpose, progress, participation, and process) can be rolled out at the organizational level and engage all personnel simultaneously or on an at-need basis.

Further support could be created using visual aids or templates which reflect the knowledge gained in the training module that employees could have on hand as the plan and conduct future meetings.

If the resources are not available to send employees to trainings, the organization could hold an in-house workshop to discuss issues regarding current meeting procedures and possible strategies to address them.

# **INTRODUCTION**

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## **PURPOSE AND SCOPE**

The purpose of this needs analysis is to identify contributing elements that create the gaps between current and desired levels of meeting effectiveness at Family Service & Children's Aid (FSCA). This needs analysis is also intended to serve as the foundation for creating or updating employee trainings and materials by giving them an opportunity to state their specific needs and expectations in terms of how they would like to see the organization's meeting procedures change. The conclusion of the analysis will describe the proposed strategies for addressing the identified issues and how they will enable employees to hold meetings that are a productive use of their time and yield positive outcomes to the betterment of the organization.

## **BACKGROUND**

FSCA is a non-profit organization that is comprised of approximately 200 employees and provides a variety of mental health and substance abuse-related services to the surrounding local communities. An improvement in the agencies' ability to design, execute, and document their meetings would have a positive cascading effect on their time and resources as well as those of the other agencies they coordinate with. Research suggests that an improvement in meeting efficiency tracks with the improvement of other valuable assets such as decision-making, enhanced communication, and employee engagement, all of which have also been identified in the needs analysis as important to the respondents.

# **PROJECT METHODOLOGY**

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## **PARTICIPANTS**

The volunteers that participated in this needs analysis are all current employees at multiple levels with the FSCA organization as well as employees at coordinating agencies that are directly involved in meetings with FSCA employees. I have included the pre-survey information letter (appendix A), which was sent to all potential participants, providing them with a brief overview of the survey and its role in the needs analysis.

## **DATA SOURCES**

Data was collected through a voluntary survey comprised of statements which were answered using a standard Likert scale which acted provided a quantitative data set as well as short answer questions which the participants responded to in their own words served as a qualitative data set.

I also researched the most common issues impacting the effectiveness of meetings and their associated strategies to compare the results of the needs analysis against.

## **DATA COLLECTION PROCEDURES**

I used Google Forms to create a survey using questions that I developed based on previous research, which I then emailed to 30 employees within Family Service & Children's Aid and its coordinating agencies. The results were collected anonymously and fed into a spreadsheet using Google Sheets to create data visualization tables.

## **DATA ANALYSIS PROCEDURES**

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Using Goole Sheets, I analyzed the Likert statement questions and graphed the data into visual charts. The summary of the short-answer questions (appendix C) was not graphed but instead used to facilitate a SWOT and Force Field Analysis.

## SWOT ANALYSIS

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A SWOT analysis was used to identify the strengths, weaknesses, opportunities for improvement, and threats to the success of meetings within the organization. The SWOT analysis enables the needs analysis to provide further specification and organization of both the positive and negative elements of the organization's ability to conduct effective meetings.









Strengths	Weaknesses
<ul style="list-style-type: none"><li>• Staff are motivated to improve meeting procedures.</li><li>• Staff communicated clear thoughts on how to improve meetings.</li><li>• Staff communicated skills they currently possess</li></ul>	<ul style="list-style-type: none"><li>• Difficulty in engaging administration to enact change.</li><li>• Wide variation of work schedules among workforce</li><li>• Mix of in-person and work from home employees</li></ul>
Opportunities	Threats
<ul style="list-style-type: none"><li>• Send motivated employees to meeting facilitator training.</li><li>• Shadow other organizations to observe their meeting procedures.</li><li>• Create workshops for ongoing analysis and improvement of meeting procedures</li></ul>	<ul style="list-style-type: none"><li>• Current accreditation may have specific policies regarding meeting procedures and outcomes.</li><li>• Lack of motivation due to disorganization</li><li>• Lack of time or resources to facilitate change</li></ul>



# FORCE FIELD ANALYSIS

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The goal of using a Force Field Analysis as part of the needs analysis was to identify the internal and external forces at play which are believed to be driving or hindering change within the organization. The indicating arrows are representative of their impact on the driving or hindering of change.

Forces Driving Change	Forces Hindering Change
Desire to improve 	Judgmental environment 
Knowledgeable Facilitator 	Authority to enact change 
Defined Goals/Objectives 	Drifting from agenda 
Documentation 	Funding 

## **SUMMARY OF FINDINGS**

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Using the Likert statements and short-answer questions as a guide, there is a clear indication that employees at FSCA have the desire and recognize the need for change. The foundation for change needs to begin at the organizational level by increasing the amount of available funding so that motivated employees can receive training in accordance with current best practices. At the employee level, change will involve implementing a more focused approach to creating and following an agenda as well as engaging those employees which can effectively act on the goals and objectives identified in meetings.

### **AREAS OF STRENGTH**

- Employees recognize the need for a change in the organizations meeting protocols.
- Employees are motivated and have clear expectations which will help begin a dialogue on what type of intervention(s) may be most effective for enacting change.
- Employees are eager to participate in meetings which require their active participation, decision-making, and feedback.
- Employees are aware of their current skills, which will facilitate further analysis of knowledge and skills that can be developed to achieve the goal of increasing meeting effectiveness.

## **AREAS OF IMPROVEMENT**

- Feedback mentioned some employees feel there is a judgmental environment which does not allow for all opinions to be shared.
- Facilitators need to be knowledgeable and guide meetings in a way that involves actively engaging the participants in discussion and decision-making.
- Meetings need to include attendees which have the authority to act on the decisions made in meetings.
- Meeting agendas need to be clearly outlined and provided to the participants for them to prepare for the meeting and contribute in a meaningful way.
- The purpose of a meeting must be clearly stated and connected to the reason why participants are involved.

## RECOMMENDATIONS

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Based on the quantitative and qualitative data gathered by the survey, there is a desire for a change in the way FSCA designs and conducts their meetings. While employees have expressed a motivation for change, the general feeling is that there is not a clear purpose for most meetings which leaves participants feeling their time spent in meetings is wasted which does not encourage them to participate in future meetings.

### **RECOMMENDATION 1: SELECT EMPLOYEES SHOULD ATTEND AN ACCREDITED TRAINING WORKSHOP TO LEARN MEETING BEST PRACTICES**

- Description
  - Employees that regularly act as facilitators should attend an accredited training workshop to learn the current best practices and structure of productive meetings. This will benefit FSCA by having knowledgeable facilitators planning and preparing meetings in a way that will be more likely to achieve the goals and objectives and encourage participation among the employees.
- **Rationale**
  - Several of the most frequent responses of the short-answer data (appendix e) were related to a facilitator-related issue such as lack of knowledge of the meeting's subject, lack of personal communication style, and lack of control in guiding the meeting through the agenda. An accredited training would provide facilitators with strategies on how to properly prepare, communicate, and guide meetings.

## **RECOMMENDATION 2: CREATE VISUAL AIDS AND TEMPLATES TO TRACK RELEVANT INFORMATION**

- **Description**

Visual aids and templates such as flowcharts and concept maps that detail the information relevant to a meetings' topic and outcomes will help employees recall and use the information more efficiently and create a routine for how meetings are created, conducted, and documented.

- **Rationale**

As noted in the short answer feedback for questions 1 and 2 (appendix e) employees reported a lack of organization and documentation of relevant information which resulted in an inability to make decisions due to missing information. By creating standard, organization-wide tools for tracking information, employees will be better able to organize and review the contents of their meetings which will facilitate decision-making and make it easier to reference information in future meetings.

### **RECOMMENDATION 3: THE ORGANIZATION WILL HOLD AN IN-HOUSE DISCUSSION TO ADDRESS MEETING-RELATED ISSUES**

- Description
  - If time or resources are a limiting factor, the organization can hold in-house discussion forums to employees an opportunity to discuss common meeting-related issues that they feel are most harmful to the success of meetings and the organization. Following the identification of issues, the discussion groups can brainstorm and create possible solutions which can be discussed and experimented with to decide on which new practices, if any, will be the most effective and efficient.
- Rationale
  - Two of the more concerning employee comments noted in the short answer feedback (appendix e) were a lack of communication with the organizations' administration and a feeling of a judgmental environment which does not allow for the sharing of opinions, this speaks for a more pervasive communication issue within the organization which could be resolved in an open forum style discussion.
  - Discussion groups can be a cost-effective way of starting a process of identifying and addressing common inhibiting factors by allowing employees to develop unique strategies that compliment the skills and working styles of the employees that will be using them. Another comment which indicates a need for an opportunity for employees to voice their concerns is that employees felt unmotivated to attend meetings in which they felt their input was not needed. An in-house discussion will serve as a helpful jumping off point for the creation of discussion groups and ensuring a safe and non-judgmental environment for employees to share their perspectives and have agency in the design of any new meeting procedures.

# **APPENDIX A: NEEDS ANALYSIS PROPOSAL**

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Scott A. Teske

Needs Analysis Project Proposal

R621 Analysis for Instructional and Performance Improvement

Due: October 10, 2023

## **Introduction and Purpose**

Meetings are an integral part of all working environments which require a significant investment of time and effort. Unproductive meetings can have a cascading impact across all levels of an organization and affect the workflow and attitudes of its employees. The purpose of this needs analysis is to identify what elements create positive and negative perceptions of meetings amongst the organization's employees to develop effective strategies to address common issues and create an environment in which successful and impactful meetings can take place.

## **Background**

A non-profit organization has recently undergone a leadership change and would like to update their meeting policies and procedures as part of a change initiative. The results of this needs analysis will serve as the foundation for creating new interventions to improve the effectiveness of meetings and serve as professional development content for all employees.

## **Proposed Project Methodology**

**Participants:** Employees at all levels of the organization.

**Data Sources:** Volunteers will complete a survey which will ask them to rate certain elements of meetings using a Likert scale and answer a brief set of questions in their own words regarding they believe are the positive and negative elements impacting the success of meetings they have participated in.

**Data Collection Procedures:** The results of the survey will be fed into a tracking spreadsheet to organize the data for later analysis and visualization.

**Analysis Procedures:** Survey responses will be sorted using a system of coded questions and responses with the closed-end portion summarized using a Likert scale and basic frequency count. Open-ended questions will be classified according to a response type (positive, neutral, negative).

The final report will include a qualitative rationale for the results alongside visual representations of the data in a quantitative format and provide a complete overview of the insights gained from the questionnaire to formulate a conclusion statement of the needs analysis which will be presented to senior management.



## **APPENDIX B: PRE-SURVEY LETTER**

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Hello (name of person),

This is Scott Teske from the prevention department at Family Service & Children's Aid. I am currently enrolled as a master's student at Indiana University. I would like to ask for your participation in a needs analysis project that I am conducting as part of one of my classes. The purpose of this needs analysis is to identify what elements create positive and negative perceptions of meetings amongst an organization's employees to develop effective strategies to address common issues and create an environment in which successful and impactful meetings can take place.

If you would like to participate, I will send you a brief survey to an email address of your choosing. The survey consists of 5 questions asking you to select your level of agreement with a particular statement and 3 short answer questions asking you to use your own thoughts and ideas. All the responses are collected anonymously and will only be used as part of my research project, any feedback that you could provide will be greatly appreciated and helpful in completing my analysis. If you have any questions or concerns, please feel free to contact me anytime day or night at the phone number or email address listed below.

Thank You,

Scott Teske  
(517) 386-0522  
[steske@strong-famillies.or](mailto:steske@strong-famillies.or)

## APPENDIX C: SURVEY QUESTIONS

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**Statement #1:** Having a clearly defined agenda is essential for maintaining the focus of a meeting.

- ☐ Strongly Agree
- ☐ Agree
- ☐ Neutral
- ☐ Disagree
- ☐ Strongly Disagree

**Statement #2:** I am more likely to actively engage in a meeting if I know the reason why it is being held.

- ☐ Strongly Agree
- ☐ Agree
- ☐ Neutral
- ☐ Disagree
- ☐ Strongly Disagree

**Statement #3:** A facilitator is essential to ensuring everyone can participate.

- ☐ Strongly Agree
- ☐ Agree
- ☐ Neutral
- ☐ Disagree
- ☐ Strongly Disagree

**Statement #4:** Controlling the number of participants is an important aspect of a successful meeting.

- ☐ Strongly Agree

- Agree
- Neutral
- Disagree
- Strongly Disagree

**Statement #5:** In the process of setting a meeting, variables such as location and access to technology need to be considered.

- Strongly Agree
  - Agree
  - Neutral
  - Disagree
  - Strongly Disagree
- 

**Short Answer Question #1:**

What are the most valuable qualities of a meeting that encourage you to participate and make effective use of your time?

**Short Answer Question #2:**

What makes a meeting unproductive or difficult to participate in?

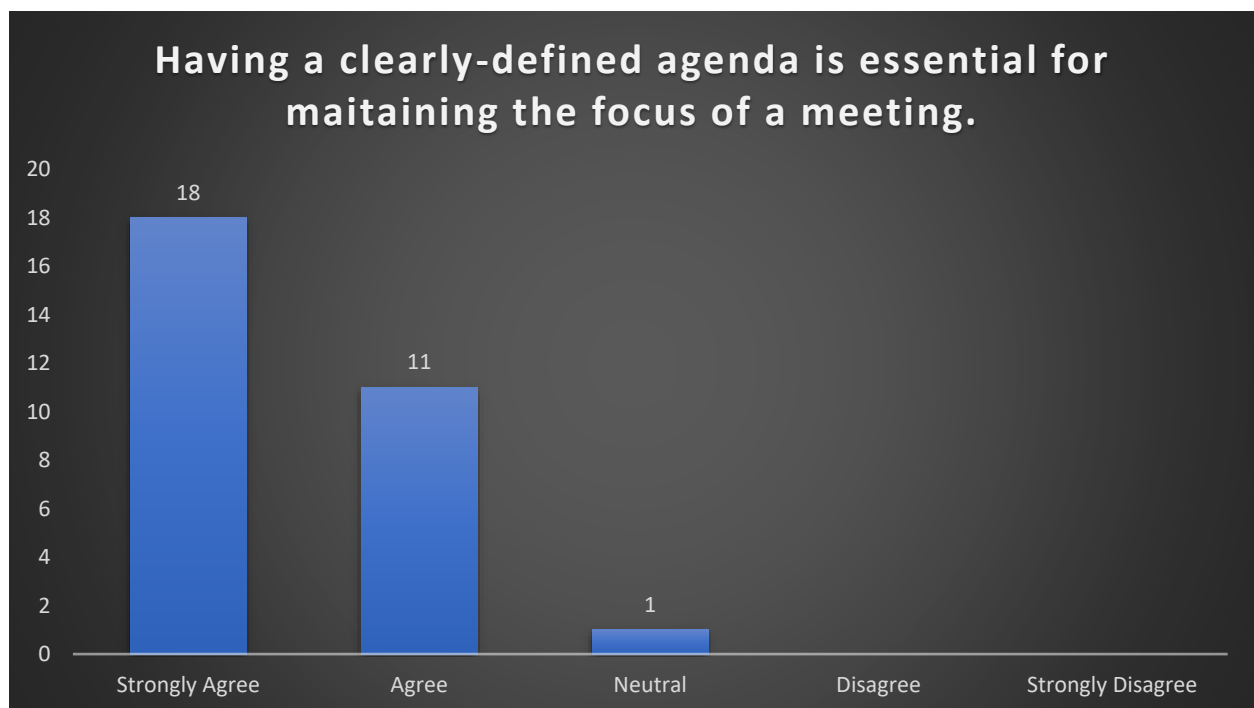
**Short Answer Question #3:**

Please feel free to provide any other thoughts or feedback that you think would be helpful in improving the content of this survey.

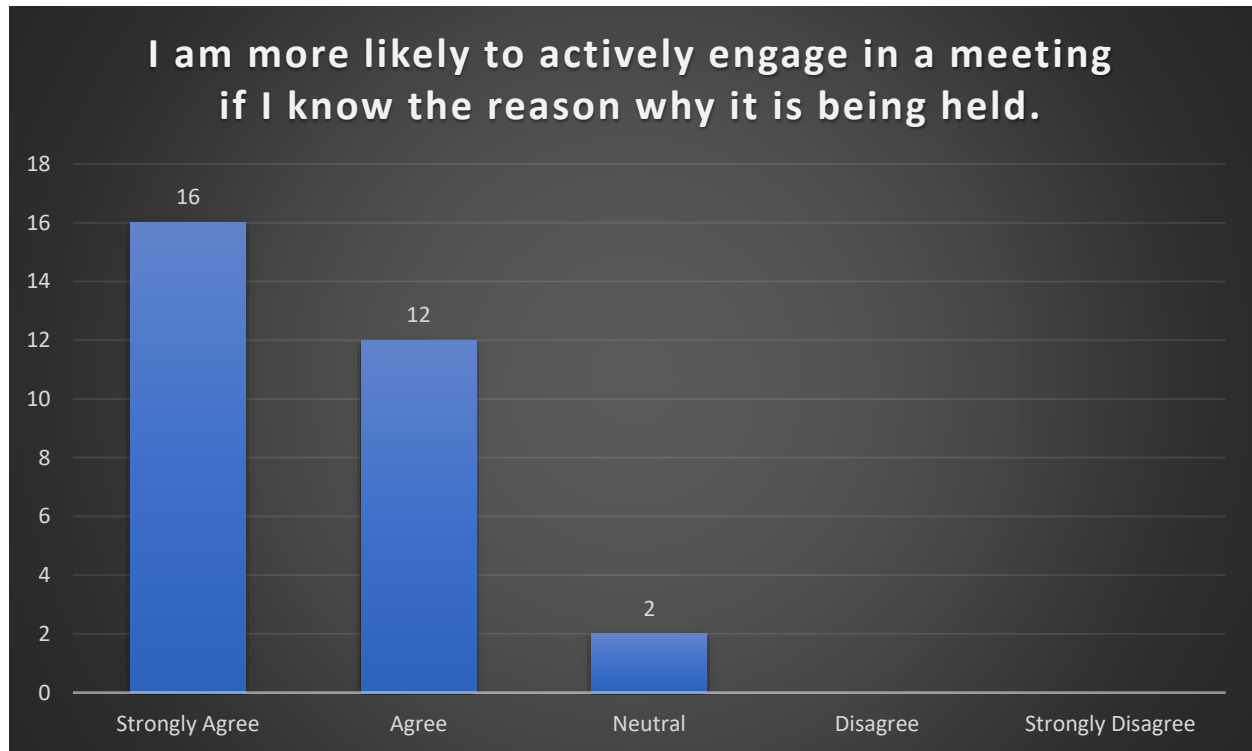
## APPENDIX D: LIKERT STATEMENT RESPONSES

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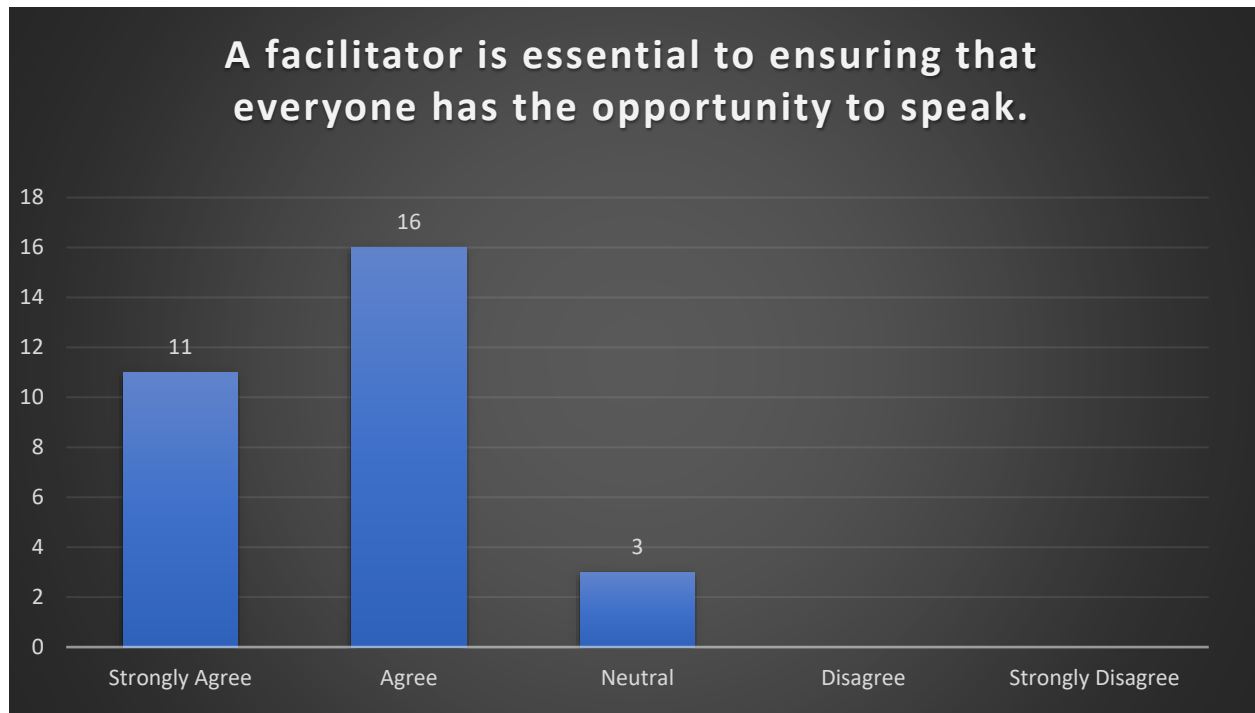
### Statement #1



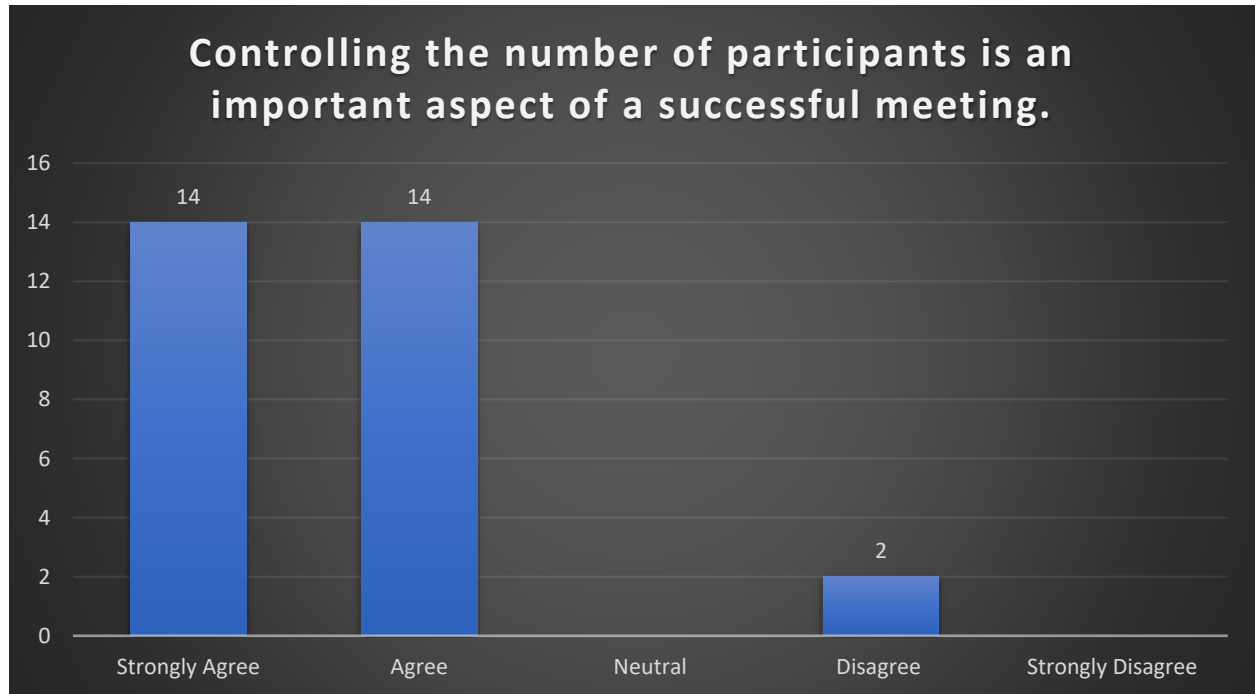
## Statement #2



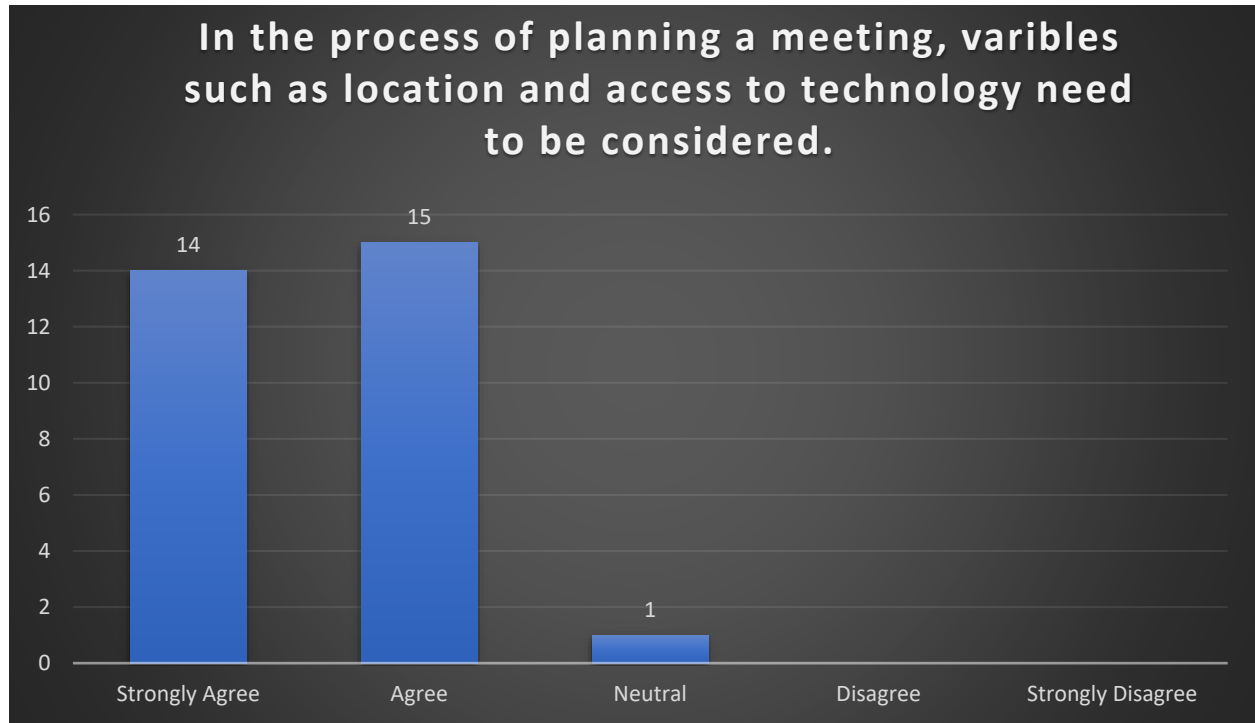
### Statement #3



## Statement #4



## Statement #5





## **APPENDIX E: SHORT ANSWER RESPONSES**

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Respondents did not answer in complete sentences, so I have summarized their feedback in bullet point statements as this was the format in which they were received.

### **Short Answer Question #1:**

What are the most valuable qualities of a meeting that encourage you to participate and make effective use of your time?

- Staying on task with the agenda
- Not letting the conversation drift too much
- Clear and focused goals/topics
- Setting norms to make a comfortable environment for people to share their ideas and opinions
- Facilitator can relate to the information they are sharing
- Effective use of time, setting time limits per agenda item
- Limiting meeting the correct and essential participants
- Having a reason and expected outcome for a meeting
- Don't waste anyone's time by letting the conversation get off track from the agenda
- Documenting appropriate information needed to make decisions and revisit in future meetings if needed
- Having the agenda sent in advance if interaction is required
- Expectations of participation to prepare for meetings in advance
- Meetings that require participant feedback and opinions rather than setting and passively receiving information from the facilitator

### **Short Answer Question #2:**

What makes a meeting unproductive or difficult to participate in?

- Meeting is disorganized
- No clear facilitator
- Meeting content could have been addressed in an email
- Unclear goals and objectives
- Judgmental environment that doesn't allow for opinions to be shared
- Facilitator-related issues:
  - Monotone speaking voice
  - Not keeping track of time, showing up late
  - Not providing agenda beforehand to prepare thoughts or questions
  - Expecting too much from participants
  - Reading from the board or script, lack of personal touch
- Too big a meeting
- No participant has the authority to make decisions
- Lack of documentation regarding what took place during the meetings (minutes)
- Bullying, judgmental behavior
- Technology issues, lack of knowledgeable personnel or IT support
- Lack of communication with administration

### **Short Answer Question #3:**

- None of the respondents completed this question on the survey .

## APPENDIX F: REFERENCES

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Mroz, Joseph & Allen, Joseph & Verhoeven, Dana & Shuffler, Marissa. (2018). Do We Really Need Another Meeting? The Science of Workplace Meetings. *Current Directions in Psychological Science*. 27. 096372141877630. 10.1177/0963721418776307.

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