Roles for Meetings

What is it?

A method used to clarify the Roles various individuals will serve during a meeting.

POINTER: Clarifying meeting roles is Step 2 for almost every other method in this book.

Each of the three key roles can be permanently assigned to the same individuals for all meetings, or can be shared and rotated between members from one meeting to another.

Key meeting roles are identified and described below.

How do I use It?

1. Select a Scribe to serve as the team’s record-keeper. This person takes notes during the meeting and records:
   - Action items, with responsibility and deadlines;
   - Decisions reached by the team, and
   - Issues raised by the team, which cannot be resolved during the meeting.

   POINTER: See Meeting AIDs, for a simple record keeping method.

   The scribe usually publishes meeting minutes. Either the scribe or facilitator reminds the team to evaluate each meeting at the end.

2. Select someone to serve as the team’s Timekeeper. This person manages the agenda, and notifies the team when the allotted time for a given topic is expiring. The group then decides whether to continue discussing this item or move on.

   POINTER: See Meeting Agenda for more on building agendas.
Select a Facilitator to serve as the discussion keeper. All team members are expected to use effective Discussion skills, but the facilitator pays special attention to team conversations to ensure that…

- Discussions stay on track.
- Everyone participates.
- As agreement is reached, items are brought to closure.
- The team's ground rules are observed.

POINTER: See LISTENing (Discussion Skills), for a method to facilitate better conversations.

See Ground Rules, for possible team norms or rules.

HINT: In some cases, the facilitator will be someone outside the team. Because they have no stake in the content of the team's work and can focus exclusively on the meeting process, trained external facilitators may also serve as scribe and/or timekeeper. Team members serving as facilitators should not attempt to fill multiple roles in the same way.

When utilizing a facilitator from outside the team, recognize that this individual can serve many different roles.

The Facilitator's Many Hats--Various roles an external consultant can serve include:

- **Reflector**--raise questions for the team to consider.
- **Observer**--raise issues for the team and provide feedback on group process only.
- **Source**--gather data for the team, stimulate thinking about alternatives, identify resources, and help assess the consequences of various options.
- **Collaborator**--offer alternatives, and participate in group decisions as a team member.
- **Trainer**--Teach the team leader and/or members.
- **Specialist**--Provide specific advice, recommend decisions.
- **Advocate**--Propose guidelines, direct or control the team's work process.

These various roles can be viewed as a continuum, like the one illustrated below.

The Facilitator's Many "Hats" A Consulting Continuum

Nondirective

Reflector Observer Source Collaborator Trainer Specialist Advocate

Directive

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*Excerpt from Chapter 1: Making Meetings*
In addition to the three key meeting roles (Scribe, Timekeeper, Facilitator), other roles may include:

- **Team leader**--While self-directed teams with shared leadership are becoming more common, most teams still have a designated leader. This person has authority and ultimate accountability for the team's performance. In addition to doing "real work" like other team members, the leader must also:
  
  - Ensure the team's purpose and goals are relevant and meaningful.
  
  - Manage key relationships outside the team, especially with the sponsor and/or customers.
  
  - Build the commitment and skills of the team.

- **Sponsor, client, or customer**--This is someone outside the team, the person that the team works for, usually the "owner" of a process or problem, or the "customer" of the team's outputs. The sponsor may not participate in meetings, but the team must always be aware of their needs and requirements.

- **Meeting keeper**--Some teams have a support person to coordinate meeting logistics and administrative details. This role can also be shared and rotated among team members.