

Appendix 4.1: Final Pilot Version of the Questionnaire

CONFIDENTIAL

I would be very grateful if you would take the time to complete this questionnaire. All data collected will be used for research purposes only and will not be disclosed to any third parties. Please do **not** identify yourself by writing your name, etc. on this paper. When you have completed the questionnaire, please return it immediately to: Robert Davison, Dept of Information Systems. Thank you for your help.

Apart from questions in Section 1, please relate all your answers to the meeting that you have just participated in.

SECTION 1:

1. How many meetings that comprise at least 5 members do you have this week? _____(1)

2. Typically what percentage of your working time do you spend in meetings per week? (2)

0-20% 21-40% 41-60% 61-80% 81-100%

3. To what extent do you like meetings? (3)

Strongly like Strongly dislike

4. How important do you rate meetings to be? (4)

Very Important Not at all important

5. How frequently do you feel that meetings are a waste of your time? (5)

Always Never

↓

5a. Why? _____

6. Would you describe yourself as:

shy Agree Disagree (6)

apprehensive Agree Disagree (7)

assertive Agree Disagree (8)

confident Agree Disagree (9)

7. Do you think that voting promotes consensus or conflict? (10)

Consensus Conflict both other _____

8. Do you think that a formal meeting structure helps to focus a meeting or acts as a restriction on a meeting? (11)

Focus Restrict both other _____

SECTION 2:

9. Did you attend this meeting as (tick one): (12)

- an elected representative
- a nominated representative
- an ex-officio member
- another kind of representative
- an observer
- other: _____

10. Do you see the function of this meeting as being for (please tick all that apply): (13-18)

- decision making Others?? _____
- discussion _____
- consensus building _____
- information gathering _____
- information dissemination _____

11. To what extent was the agenda of this meeting followed? (19)

Completely Not at all

12. Do you agree that the leader of the meeting had a hidden agenda? (20)

Strongly Agree Strongly Disagree

13. Did voting take place in the meeting? (21) Yes No

13a. If YES, was it secret? (22) Yes No Both

14. Was this meeting governed by consensus or conflict? (23)

Consensus Conflict both other _____

15. Was jargon often used in the meeting? (24) Yes No

15a. If YES, to what extent were you confused by the jargon? (25)

Very Confused Not at all Confused

16. To what extent would you say that this meeting was result oriented? (26, Eff1)

Strongly Result Oriented Weakly Result Oriented

17. With regard to your own participation in the meeting, please indicate to what extent you agree with the following statements:

a) *You feel that you played a useful role.* (27)

Strongly Agree Strongly Disagree

b) *The language of the meeting prevented you from participating.* (28, Com1)

Strongly Agree Strongly Disagree

c) *You found it hard to understand other group members when they talked.* (29, Com2)

Strongly Agree Strongly Disagree

d) *You experienced problems expressing yourself.* (30, Com3)

Strongly Agree Strongly Disagree

e) *You felt reluctant to put forward your own ideas.* (31, Com4)

Strongly Agree Strongly Disagree

f) *You experienced pressure, either to conform to a particular viewpoint or not to contradict others.* (32, Stat4)

Strongly Agree Strongly Disagree

g) *Other meeting members paid attention to you when you talked.* (33)

Strongly Agree Strongly Disagree

18. With regard to all meeting members as a whole, how would you rate the discussions in the meeting in terms of the following scales?

Very meaningful Totally meaningless
(34, Diss1)

Very appropriate Totally inappropriate
(35, Diss2)

Very free and open Totally closed/restricted
(36, Diss3)

Creative/imaginative approaches used Familiar/unimaginative approaches used
(37, Diss4)

19. Please indicate to what extent you agree with the following statements:

a) *Other members lost control of their emotions in the meeting.* (38)

Strongly Agree Strongly Disagree

b) *Other members appeared willing to answer questions when asked.*
(39, Team1)

Strongly Agree Strongly Disagree

c) *Members worked together as a team.* (40, Team2)

Strongly Agree Strongly Disagree

d) *Members had sufficient access to the information they needed so as to participate actively in and fully understand the meeting.* (41, Team3)

Strongly Agree Strongly Disagree

20. Please indicate to what extent you agree with the following statements:

a) *The time spent in the meeting was efficiently used.*(42, Eff2)

Strongly Agree Strongly Disagree

b) *Issues raised in the meeting were discussed thoroughly.* (43, Eff3)

Strongly Agree Strongly Disagree

c) *Some information presented to the meeting was actually false, untrue or out-of date.* (44)

Strongly Agree Strongly Disagree

d) *The quality of the meeting would have been improved if meeting members had had the opportunity of contributing ideas anonymously.* (45)

Strongly Agree Strongly Disagree

e) *Some group members tried to intimidate others, e.g. by talking loudly, using aggressive gestures, making threats, etc.* (46, Stat1)

Strongly Agree Strongly Disagree

f) *Some group members tried to use their influence, status or power so as to force issues on the other group members.* (47, Stat2)

Strongly Agree Strongly Disagree

g) *You felt inhibited from participating in the discussion because of the behaviour of other meeting members.* (48, Stat3)

Strongly Agree Strongly Disagree

21. What percentage of meeting time do you think was spent on the discussion of agenda-based items? (49, eff4)

0-20% 21-40% 41-60% 61-80% 81-100%

22. Was this meeting 'led' by someone in authority, or did it develop relatively autonomously with many people contributing to the meeting process? (50)

Led by someone in authority Developed autonomously

23. Did ex-officio/non-elected members put forward proposals? (51)

Yes No N/A

23a. If YES, were these proposals accepted? (52)

Accepted Rejected Both

24. Did nominated/elected members put forward proposals? (53)

Yes No N/A

24a. If YES, were these proposals accepted? (54)

Accepted Rejected Both

25. How would you rate your overall level of satisfaction with this meeting?
(55, CV)

Very Satisfied Very Dissatisfied

When you have completed the questionnaire, please return it to: Robert Davison, Dept of Information Systems, City University of Hong Kong, (788-7534).

Appendix 4.2: Questionnaire Distributed to a Large University Population

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Please can you answer the following questions. For questions 5-12, please relate your answers to any meeting that involved at least 5 members. Please tick the boxes () as appropriate.

Part One: A few questions about you, your personal characteristics and your attitudes towards meetings in general.

1 a. Are you an Academic/Administrative/Technical/General Staff member or a Research Student or Research Associate (Please circle as appropriate). (1)

b. Are you Male Female ? (2)

2. Would you describe yourself as:

shy	Agree <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree (3)
apprehensive	Agree <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree (4)
assertive	Agree <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree (5)
confident	Agree <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree (6)

3a. How many meetings that comprise at least 5 people do you have this week? _____(7)

b. Typically what percentage of your working time do you spend in meetings per week? (8)

0-20% 21-40% 41-60% 61-80% 81-100%

4a. To what extent do you like meetings? (9)

Strongly like Strongly dislike

b. How important do you rate meetings to be? (10)

Very Important Not at all important

Part Two: Some questions about any meeting involving at least five people which you attended, preferably within the university.

5. Was this a: Senate/Faculty Board/Staff/Course Committee/Other _____ meeting? (Please circle as applicable or specify in case of "other") (11)

6. How many people were in this meeting?

5-10 ; 11-15 ; 16-20 ; 21-25 ; 26+ _____ (How many?) (12)

7. When did this meeting take place? Within the last week ; 2 weeks ; 1 month ; 2 months ; 3 months ; 6 months ; More than 6 months ago (13)

8. With regard to your own participation in the meeting, please indicate to what extent you agree with the following statements:

a) *You feel that you played a useful role.* (14, CR)

Strongly Agree Strongly Disagree

b) *The language of the meeting prevented you from participating.* (15, C1)

Strongly Agree Strongly Disagree

c) *You found it hard to understand other group members when they talked.* (16, C2)

Strongly Agree Strongly Disagree

d) *You experienced problems expressing yourself.* (17, C3)

Strongly Agree Strongly Disagree

e) *You felt reluctant to put forward your own ideas.* (18, C4)

Strongly Agree Strongly Disagree

f) *You experienced pressure, either to conform to a particular viewpoint or not to contradict others.* (19, S4)

Strongly Agree Strongly Disagree

9. With regard to all meeting members as a whole, how would you rate the discussions in the meeting in terms of the following scales?

Very meaningful Totally meaningless (20, D1)

Very appropriate Totally inappropriate (21, D2)

Very free and open Totally closed/restricted (22, D3)

Creative/imaginative approaches used Familiar/unimaginative approaches used (23, D4)

10. To what extent would you say that this meeting was result oriented? (24, E1)

Strongly Result Oriented Weakly Result Oriented

11. Please indicate to what extent you agree with the following statements:

a) *Other members appeared willing to answer questions when asked.* (25, T1)

Strongly Agree Strongly Disagree

b) *Members worked together as a team.* (26, T2)

Strongly Agree Strongly Disagree

c) *Members had sufficient access to the information they needed so as to participate actively in and fully understand the meeting.* (27, T3)

Strongly Agree Strongly Disagree

d) *The time spent in the meeting was efficiently used.* (28, E2)

Strongly Agree Strongly Disagree

e) *Issues raised in the meeting were discussed thoroughly.* (29, E3)

Strongly Agree Strongly Disagree

f) *Some group members tried to intimidate others, e.g. by talking loudly, using aggressive gestures, making threats, etc.* (30, S1)

Strongly Agree Strongly Disagree

g) *Some group members tried to use their influence, status or power so as to force issues on the other group members.* (31, S2)

Strongly Agree Strongly Disagree

h) *You felt inhibited from participating in the discussion because of the behaviour of other meeting members.* (32, S3)

Strongly Agree Strongly Disagree

12. What percentage of meeting time do you think was spent on serious discussion? (33, E4)

0-20% 21-40% 41-60% 61-80% 81-100%

Please now return the questionnaire to me using the address label provided. Many thanks for your help.

Appendix 4.3: Validated Instrument Items

With regard to your own participation in the meeting, please indicate to what extent you agree with the following statements :

C1 The language of the meeting prevented you from participating.
Strongly Agree Strongly Disagree

C2 You found it hard to understand other group members when they talked.
Strongly Agree Strongly Disagree

C3 You experienced problems expressing yourself.
Strongly Agree Strongly Disagree

C4 You felt reluctant to put forward your own ideas.
Strongly Agree Strongly Disagree

With regard to all meeting members as a whole, how would you rate the discussions in the meeting in terms of the following scales?

D1 Very meaningful Totally meaningless
D2 Very appropriate Totally inappropriate
D4 Creative/imaginative approaches used Familiar/unimaginative approaches used

E1 To what extent would you say that this meeting was result oriented?
Strongly Result Oriented Weakly Result Oriented

Please indicate to what extent you agree with the following statements (E2 & E3):

E2 The time spent in the meeting was efficiently used.
Strongly Agree Strongly Disagree

E3 Issues raised in the meeting were discussed thoroughly.
Strongly Agree Strongly Disagree

E4 What percentage of meeting time do you think was spent on serious discussion?
 0-20%; 21-40%; 41-60% 61-80% 81-100%

Please indicate to what extent you agree with the following statements:

S1 Some group members tried to intimidate others, e.g. by talking loudly, using aggressive gestures, making threats, etc.
Strongly Agree Strongly Disagree

S2 Some group members tried to use their influence, status or power so as to force issues on the other group members.
Strongly Agree Strongly Disagree

S3 You felt inhibited from participating in the discussion because of the behaviour of other meeting members.

Strongly Agree Strongly Disagree

S4 You experienced pressure, either to conform to a particular viewpoint or not to contradict others.

Strongly Agree Strongly Disagree

T1 Other members appeared willing to answer questions when asked.

Strongly Agree Strongly Disagree

T2 Members worked together as a team.

Strongly Agree Strongly Disagree

T3 Members had sufficient access to the information they needed so as to participate actively in and fully understand the meeting.

Strongly Agree Strongly Disagree

With regard to your own participation in the meeting, please indicate to what extent you agree with the following statement:

Criterion Variable:

You feel that you played a useful role.

Strongly Agree Strongly Disagree

Appendix 5.1: Questionnaire for Resource Planning Task Group

This questionnaire is designed to elicit some information about the processes that occur in meetings of the Resource Planning Task Group. It would be most helpful if you could answer the following questions and bring the completed questionnaire to the June 5th meeting. Thank you.

Part One: Demographics and Attitudes

1 a. Are you Male Female ? (1)

2. Would you describe yourself as:

shy	Agree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree (2)
apprehensive	Agree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree (3)
assertive	Agree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree (4)
confident	Agree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree (5)

3a. How many meetings of at least 5 people have you participated in during the last week?
___ (6)

b. Typically what percentage of your working time do you spend in meetings per week? (7)

0-20% 21-40% 41-60% 61-80% 81-100%

4a. To what extent do you like meetings? (8)

Strongly like Strongly dislike

b. How important do you rate meetings to be? (9)

Very Important Not at all important

Part Two: Some questions about the most recent Resource Planning Task Group meeting:

5. With regard to your own participation in the meeting, please indicate to what extent you agree with the following statements:

a) *You feel that you played a useful role.* (10, CR)

Strongly Agree Strongly Disagree

b) *The language of the meeting prevented you from participating.* (11, C1)

Strongly Agree Strongly Disagree

c) *You found it hard to understand other group members when they talked.* (12, C2)

Strongly Agree Strongly Disagree

d) *You experienced problems expressing yourself.* (13, C3)
Strongly Agree Strongly Disagree

e) *You felt reluctant to put forward your own ideas.* (14, C4)
Strongly Agree Strongly Disagree

f) *You experienced pressure, either to conform to a particular viewpoint or not to contradict others.* (15, S4)
Strongly Agree Strongly Disagree

6. With regard to all meeting members as a whole, how would you rate the discussions in the meeting in terms of the following scales?

Meaningful	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Meaningless	(16, D1)
Appropriate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Inappropriate	(17, D2)
Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Closed	(18, D3)
Imaginative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Unimaginative	(19, D4)

7. Please indicate to what extent you agree with the following statements:

a) *Other members appeared willing to answer questions when asked.* (20, T1)
Strongly Agree Strongly Disagree

b) *Members worked together as a team.* (21, T2)
Strongly Agree Strongly Disagree

c) *Members had sufficient access to the information they needed so as to participate actively in and fully understand the meeting.* (22, T3)
Strongly Agree Strongly Disagree

d) *The time spent in the meeting was efficiently used.* (23, E2)
Strongly Agree Strongly Disagree

e) *Issues raised in the meeting were discussed thoroughly.* (24, E3)
Strongly Agree Strongly Disagree

f) *Some group members tried to intimidate others, e.g. by talking loudly, using aggressive gestures, making threats, etc.* (25, S1)
Strongly Agree Strongly Disagree

g) *Some group members tried to use their influence, status or power so as to force issues on the other group members.* (26, S2)
Strongly Agree Strongly Disagree

h) *You felt inhibited from participating in the discussion because of the behaviour of other meeting members.* (27, S3)
Strongly Agree Strongly Disagree

8. What percentage of meeting time do you think was spent on serious discussion? ____ %
(28, E4)

9. To what extent would you say that this meeting was result oriented? (29, E1)

Strongly Result Oriented Weakly Result Oriented

10. How would you rate your overall level of satisfaction with the meeting? (30)

Strongly Agree Strongly Disagree

11. To what extent was consensus achieved in the meeting? (31)

Strongly Achieved Weakly Achieved

12. On average, how many hours per day do you use a PC? _____ (32)

13. What do you typically use a PC for? _____
_____ (33)

Please bring the completed questionnaire to the June 5th Meeting of the Task Group.
Thank you.

Appendix 6.1: Letter of Invitation to the First FRPT Meeting

Dear Colleague:

Our records indicate that you will be participating in the faculty retreat taking place in Guangzhou 8/9 November. In order to ensure that the retreat is as successful as possible, a planning session is being organised to discuss possible retreat activities. You are cordially invited to participate in this planning session to be held sometime next week, most likely Wednesday afternoon in the IS Department Computer Lab.

We will use electronic meeting support software to facilitate the generation and organisation of ideas for retreat activities. For those of you who are not familiar with electronic meeting support systems, these are tools designed to improve group interaction and group productivity in meetings. The planning session will be co-ordinated by a meeting leader and a meeting facilitator who will introduce the technology and assist the members of the group in their use of the software.

Since space is limited, please reply by 12:00 Monday (Oct. 7th) to indicate your interest as well as to guarantee your seat in the lab. If you have difficulty attending on Wednesday afternoon, please indicate an alternative time. We will confirm exact time and location of the session by email later on Monday.

Best Wishes
The Organising Committee

Appendix 6.2: Questionnaire for the Faculty Retreat Planning Meeting

Part One: Demographics and Attitudes

1 a. Are you Male Female ? (1)

2. Would you describe yourself as:

shy	Agree <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree (2)
apprehensive	Agree <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree (3)
assertive	Agree <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree (4)
confident	Agree <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree (5)

3a. How many meetings of at least 5 people have you participated in during the last week?
 ___ (6)

b. Typically what percentage of your working time do you spend in meetings per week? (7)

0-20% 21-40% 41-60% 61-80% 81-100%

4a. To what extent do you like meetings? (8)

Strongly like Strongly dislike

b. How important do you rate meetings to be? (9)

Very Important Not at all important

Part Two: Some questions about the Faculty Retreat Planning Session we have just held.

5. With regard to your own participation in the meeting, please indicate to what extent you agree with the following statements:

a) *You feel that you played a useful role.* (10, CR)

Strongly Agree Strongly Disagree

b) *The language of the meeting prevented you from participating.* (11, C1)

Strongly Agree Strongly Disagree

c) *You found it hard to understand other group members when they talked/typed.* (12, C2)

Strongly Agree Strongly Disagree

d) *You experienced problems expressing yourself.* (13, C3)
Strongly Agree Strongly Disagree

e) *You felt reluctant to put forward your own ideas.* (14, C4)
Strongly Agree Strongly Disagree

f) *You experienced pressure, either to conform to a particular viewpoint or not to contradict others.* (15, S4)
Strongly Agree Strongly Disagree

6. With regard to all meeting members as a whole, how would you rate the discussions in the meeting in terms of the following scales?

Meaningful	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Meaningless	(16, D1)
Appropriate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Inappropriate	(17, D2)
Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Closed	(18, D3)
Imaginative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Unimaginative	(19, D4)

7. Please indicate to what extent you agree with the following statements:

a) *Other members appeared willing to answer questions when asked.* (20, T1)
Strongly Agree Strongly Disagree

b) *Members worked together as a team.* (21, T2)
Strongly Agree Strongly Disagree

c) *Members had sufficient access to the information they needed so as to participate actively in and fully understand the meeting.* (22, T3)
Strongly Agree Strongly Disagree

d) *The time spent in the meeting was efficiently used.* (23, E2)
Strongly Agree Strongly Disagree

e) *Issues raised in the meeting were discussed thoroughly.* (24, E3)
Strongly Agree Strongly Disagree

f) *Some group members tried to intimidate others, e.g. by talking loudly, using aggressive gestures, making threats, etc.* (25, S1)
Strongly Agree Strongly Disagree

g) *Some group members tried to use their influence, status or power so as to force issues on the other group members.* (26, S2)
Strongly Agree Strongly Disagree

h) *You felt inhibited from participating in the discussion because of the behaviour of other meeting members.* (27, S3)
Strongly Agree Strongly Disagree

8. What percentage of meeting time do you think was spent on serious discussion? ____ %
(28, E4)

9. To what extent would you say that this meeting was result oriented? (29, E1)

Strongly Result Oriented Weakly Result Oriented

10. How would you rate your overall level of satisfaction with the meeting? (30)

Strongly Agree Strongly Disagree

11. To what extent was consensus achieved in the meeting? (31)

Strongly Achieved Weakly Achieved

12. How comfortable do you feel using the technology?

Very comfortable Very uncomfortable

13. To what extent did the technology hinder/facilitate your participation in this meeting?

Strongly hindered Strongly facilitated

13a. Why? _____

14. Do you have any other comments you would like to make? _____

Appendix 6.3: Letter of Invitation to the Second FRPT Meeting

Dear Colleagues,

We would like to take this opportunity to thank you all for your interest and participation in the Faculty Retreat Planning Session that took place this Wednesday afternoon.

Having looked over the information that we created, we feel that it would be profitable to continue that session, at the same time making use of some additional features of the GroupSystems software, and also focusing on the overall theme of the retreat and how this theme relates to the individual session topics.

Therefore, we have decided to schedule a second session for the group at the same time and place next week - Wednesday 14:30 in P7903. As before we expect that this meeting will last approximately one hour.

If you were unable to come to the first session, but would like to attend the second session, then we strongly encourage you to do so. If you did come to the first session and would like to continue to participate in this process, then you are equally welcome. We have room for all of you and hope to see you there.

We hope that you can take a few minutes to read through the handouts that we distributed after the last meeting (copies will be sent to those of you who were unable to come to the first meeting very shortly) so as to be able to continue the process easily.

If you intend to come to this second session, would you be so kind as to let us know by replying to this message?

Many thanks,

The Organising Committee

Appendix 8.1: Re-engineering the Billing Process at Stable Loan: The Role of Collaborative Software

Background

Group Support Systems (GSS) are a generic 'software tool' used to support meetings. Developed primarily in the USA over the last 15 years, they have achieved remarkable results with substantial reductions in meeting process time and person-hours spent in meetings, yet improving meeting productivity, meeting participant satisfaction, and sense of ownership with meeting outcomes. Much of the research in this area has been conducted in Western cultures - both organisational and national - and thus the software itself tends to reflect Western norms.

Stable Loan Project

In this research, I am attempting to introduce and adapt GSS to the rather different cultural environment of Hong Kong. I am particularly interested in the way that GSS mediates meeting processes, for example enabling improved participation when different hierarchical levels are represented in a meeting. However, rather than just give a group of people the software and let them get on with it, my role as a facilitator demands that I play a more active role, helping the group to come to terms with the technology and use it effectively so as to realise real improvements in its meetings. In order to improve the facilitation of the meeting, it is useful if meeting participant perceptions of meeting processes can be collected. It is preferable to do this on an ongoing basis, i.e. so that participant perceptions can be examined over time, and so that the facilitation style can be modified to reflect the needs of the group. A questionnaire has been developed to collect these perceptions, but it is also supported by unstructured interviews with participants.

Outcomes/Benefits

There are two key outcomes to this technology supported meeting process:

- A better meeting (with all that that implies in terms of productivity, satisfaction, consensus, ownership, efficiency, ...).
- A better understanding of how to provide technology support for meetings, in this case in Hong Kong.

Software Facilitator and Researcher:

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Appendix 8.2: Questionnaire for Stable Loan (Initial Version)

Part One: Demographics and Attitudes

1 a. Are you Male Female ? (1)

2. Would you describe yourself as:

shy	Agree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree	(2)
apprehensive	Agree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree	(3)
assertive	Agree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree	(4)
confident	Agree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree	(5)

3 a. How many meetings of at least 5 people have you participated in during the last week?
_____ (6)

b. Typically what percentage of your working time do you spend in meetings per week? (7)

0-20% 21-40% 41-60% 61-80% 81-100%

4a. To what extent do you like meetings? (8)

Strongly like Strongly dislike

b. How important do you rate meetings to be? (9)

Very Important Not at all important

Part Two: Some questions about this meeting.

5. With regard to your own participation in the meeting, please indicate to what extent you agree with the following statements:

a) *You feel that you played a useful role.* (10, CR)

Strongly Agree Strongly Disagree

b) *The language of the meeting prevented you from participating.* (11, C1)

Strongly Agree Strongly Disagree

c) *You found it hard to understand other group members when they talked*
(12, C2)

Strongly Agree Strongly Disagree

d) *You experienced problems expressing yourself.* (13, C3)

Strongly Agree Strongly Disagree

e) *You felt reluctant to put forward your own ideas.* (14, C4)

Strongly Agree Strongly Disagree

f) *You experienced pressure, either to conform to a particular viewpoint or not to contradict others.* (15, S4)

Strongly Agree Strongly Disagree

6. With regard to all meeting members as a whole, how would you rate the discussions in the meeting in terms of the following scales?

Meaningful Meaningless (16, D1)

Appropriate Inappropriate (17, D2)

Open Closed (18, D3)

Imaginative Unimaginative (19, D4)

7. Please indicate to what extent you agree with the following statements:

a) *Other members appeared willing to answer questions when asked.* (20, T1)

Strongly Agree Strongly Disagree

b) *Members worked together as a team.* (21, T2)

Strongly Agree Strongly Disagree

c) *Members had sufficient access to the information they needed so as to participate actively in and fully understand the meeting.* (22, T3)

Strongly Agree Strongly Disagree

d) *The time spent in the meeting was efficiently used.* (23, E2)

Strongly Agree Strongly Disagree

e) *Issues raised in the meeting were discussed thoroughly.* (24, E3)

Strongly Agree Strongly Disagree

f) *Some group members tried to intimidate others, e.g. by talking loudly, using aggressive gestures, making threats, etc.* (25, S1)

Strongly Agree Strongly Disagree

g) *Some group members tried to use their influence, status or power so as to force issues on the other group members.* (26, S2)

Strongly Agree Strongly Disagree

h) *You felt inhibited from participating in the discussion because of the behaviour of other meeting members.* (27, S3)

Strongly Agree Strongly Disagree

8. What percentage of meeting time do you think was spent on serious discussion? _____
% (28, E4)

9. To what extent would you say that this meeting was result oriented? (29, E1)

Strongly Result Oriented Weakly Result Oriented

10. How would you rate your overall level of satisfaction with the meeting? (30)

Strongly Satisfied Strongly Dissatisfied

11. To what extent was consensus achieved in the meeting? (31)

Strongly Achieved Weakly Achieved

12. How comfortable do you feel using the technology?

Very Comfortable Very Uncomfortable

13. To what extent did the technology hinder/facilitate your participation in this meeting?

Strongly hindered Strongly facilitated

13a. Why?

14. Do you have any other comments you would like to make?

Appendix 8.3: Ideal Billing Process - Draft for Discussion at Next Meeting

IDEAL BILLING PROCESS

The ideal Billing Process comprises four stages, namely Initiation, Review, Approval and Finalisation. The tasks to be performed at each stage are detailed below. The parties responsible for performing each of these tasks are identified beforehand. This process is independent of specific implementation considerations.

RESPONSIBILITIES

Under normal circumstances, Audit Engagement Managers are responsible for initiating all Audit bills, including progress billings and final billings of fees and billings of outstanding OPE. In the other divisions such responsibility normally rests with the member of staff in charge of the staff group handling the engagement. Responsibility for the review of Audit bills rests with the Audit Engagement Partners. In the other divisions it rests with the Engagement Managers. There are a few situations in which other parties may initiate and review bills. An Audit Engagement Partner or a non-Audit Engagement Manager may initiate and review a bill directly, provided that the normal initiator is notified of this action by e-mail. Similarly, a non-Audit Engagement Partner may initiate and review a bill provided that the normal initiator and the normal reviewer are notified of this action by e-mail.

Responsibility for bill approval always rests with the Contact Partners. Their secretaries are responsible for bill finalisation.

When absent from the office, all individuals involved in the Billing Process must appoint a single deputy to carry out their billing duties.

INITIATION

On line enquiries and reports are available to provide bill initiators with the information they require regarding work in progress and unbilled OPE. The reports provide current work in progress and unbilled OPE balances by engagement for all engagements under the initiator's authority. It is possible to edit these reports using Excel. On line enquires include an up to date breakdown of total time charges by staff for an engagement as well as a history of work in progress movements for an engagement within a given period. Similarly, there is a breakdown of unbilled OPE by OPE code for an engagement as well as a history of unbilled OPE movements for an engagement within a given period. The results of enquiries may be easily copied into Word or Excel. After appropriately reviewing the available information, the initiator will draft a debit note in the form of a Word document. Drafting consists of the three steps detailed hereafter.

In the first step, an input screen is invoked into which the initiator enters the engagement code, bill currency and the total bill amount. After entering the client

code the client name will be displayed. If the entered engagement code is any way invalid, or it corresponds to an engagement over which the user does not have initiation authority, then the user will be advised accordingly and the input screen will then clear down. The bill currency is selected from a look up list. The total bill amount must be numeric, positive and to two decimal places. Upon successful confirmation of the entered data, a Word document is created complete with all details ultimately to appear on the debit note other than the billing text and a bill number. A record for maintaining supplementary billing details is also created. At this point, the status of the bill is set to new. Any bill at new status may be cancelled by the initiator without notification or approval.

In the second step, the debit note document is edited to insert the billing text and amend any of the other details as required. Standard wordings are available for each division which may be copied and pasted into a new debit note document as required. Alternatively, billing text may be cut from another debit note and pasted into the new one.

In the third step, the initiator edits the record of supplementary billing details as required. Expected details include a split of the total bill amount between fees and OPE (as seen from the firm's perspective) and any necessary additional remarks for the attention of the reviewer and the approver. Upon completion of the above three steps, the initiator updates the status of the bill to drafted.

REVIEW

A user may review any bill at drafted status for which they have review authority over the corresponding engagement. This is done by editing the debit note document as required and amending the record of supplementary billing details accordingly. If the reviewer cancels a bill then the initiator should be advised by e-mail of this action and the reasons for it. Similar advice should be given in the event of a change to the total bill amount. Once satisfied with the drafted bill, the reviewer updates its status to reviewed.

APPROVAL

A Contact Partner may approve any bills raised against his clients which are at reviewed status. This is done by editing the debit note document as required and amending the record of supplementary billing details accordingly. If the Contact Partner cancels a bill then the initiator and the reviewer should be advised by e-mail of this action and the reasons for it. Similar advice should be given in the event of a change to the total bill amount. Once satisfied with the reviewed bill, the Contact Partner updates its status to approved.

FINALISATION

A Partner's secretary should finalise all bills raised against her Partner's clients which are at approved status. This is done for each such bill by first updating the accounts receivable, time management and OPE management databases

simultaneously. A bill number is assigned in doing so. The debit note should be edited to display this bill number. A single copy of the debit note should then be printed on the firm's headed stationery. The bill date is automatically updated upon printing. For a Send Out client the hard copy debit note should then be enveloped together with a payment details enclosure and sent to the mail room for franking and despatch. For an In House client the hard copy debit note should be routed in accordance with the debit note reference. The debit note document should then be immediately archived to an on-line media where it cannot be subsequently modified. Finally, the Partner's secretary updates the status of the bill to finalised. Records of supplementary billing details for finalised bills should be purged periodically.

Queries:

- How should billings across several engagements be handled? Any ideas?
- Should debit notes be actually signed, have scanned signatures or have no signatures at all? I propose to raise this issue at the next SRG meeting.
- How should In House clients be categorised? And how should each category of In House debit note be routed?

NOTES:

- It is currently the practice in Audit that Engagement Partners initiate billings of outstanding OPE without consulting or notifying the respective Engagement Managers. Engagement Managers will in future initiate such billings.
- Staff groups in Company Secretarial division will need to be restructured to reflect the staff member in charge of each engagement. This proposed change has already been positively received by Company Secretarial Engagement Managers. Some reallocation of engagements may also be required in the Tax and Business Services divisions.
- Close-outs and write-offs will not be performed as part of the billing process.
- In House clients will need to be categorised in accordance with the routing of debit notes.

Appendix 8.4: Questionnaire for Stable Loan (Revised Version)

1. Are you Male Female ? (1)
2. Compared to previous meetings of the billing process review group, do you feel that:
- a) *The role you played in this meeting was* (2, CR)
More useful Stayed about the same Less useful
- b) *Your ability to participate in the meeting* (3, C1)
Improved Stayed about the same Deteriorated
- c) *Your understanding of the typed comments from other group members* (4, C2)
Improved Stayed about the same Deteriorated
- d) *Your ability to express yourself* (5, C3)
Improved Stayed about the same Deteriorated
- e) *Your willingness to put forward ideas* (6, C4)
Increased Stayed about the same Decreased
- f) *The pressure you experienced, either to conform to a particular viewpoint or not to contradict others* (7, S4)
Increased Stayed about the same Decreased
3. Compared to previous meetings of the billing process review group, do you feel the discussions improved, stayed the same or deteriorated on the following scales:
- Meaningful (8, D1) Improved ; Stayed about the same ; Deteriorated
- Appropriate (9, D2) Improved ; Stayed about the same ; Deteriorated
- Open (10, D3) Improved ; Stayed about the same ; Deteriorated
- Imaginative (11, D4) Improved ; Stayed about the same ; Deteriorated
4. Compared to previous meetings of the billing process review group, do you think that:
- a) *The willingness of other members to answer questions when asked* (12, T1)
Increased Stayed about the same Decreased
- b) *The extent to which members worked together as a team* (13, T2)
Increased Stayed about the same Decreased
- c) *The extent to which members had sufficient access to the information they needed so as to participate actively in and fully understand the meeting* (14, T3)
Increased Stayed about the same Decreased
- d) *The time in the meeting was used* (15, E2)
More efficiently As efficiently Less efficiently

e) *Ideas were discussed* (16, E3)

More thoroughly As thoroughly Less thoroughly

f) *The extent to which some group members tried to intimidate others, e.g. by talking loudly, using aggressive gestures, making threats, etc.* (17, S1)

Increased Stayed about the same Decreased

g) *The extent to which some group members tried to use their influence, status or power so as to force issues on the other group members* (18, S2)

Increased Stayed about the same Decreased

h) *The extent to which you felt inhibited from participating in the discussion because of the behaviour of other meeting members* (19, S3)

Increased Stayed about the same Decreased

5. What percentage of this meeting's time do you think was spent on serious discussion?
____ % (20, E4)

6. To what extent would you say that this meeting was result oriented? (21, E1)

Strongly Result Oriented Weakly Result Oriented

7. How would you rate your overall level of satisfaction with this meeting? (22)

Strongly Satisfied Strongly Dissatisfied

8. To what extent was consensus achieved in this meeting? (23)

Strongly Achieved Weakly Achieved

9. Compared to previous meetings of the billing process review group, how do you feel about using the technology? (24)

More Comfortable As comfortable Less comfortable

10. Compared to previous meetings of the billing process review group do you feel that the technology facilitated your participation in this meeting more or less? (25)

Facilitated more No difference Facilitated Less

10a. Why?

11. Do you have any other comments you would like to make?

Appendix 8.5: Participation in BPR - Development of a Methodology for BPR Reviews: Using the GSS

Difficulties of GSS and BPR in the Hong Kong context.

Today we are going to do something a bit different. So far we have focused entirely on the billing process review. But this group has a second, equally important, function, which is to review the methodology used in Stable Loan for BPR reviews. Although this is the first such review using a BPR approach, there may well be others in future and we would like to learn from this first experience so as to guide the later work.

I'd like to frame this review in a learning context - we are learning together about the best way to do the BPR. So far we have had the software GSS available though we have not always been using it. Part of this morning's discussion can relate to the suitability or appropriateness of using GSS (or any other software tools) to assist in BPR reviews.

To use the limited amount of time effectively, I would like to use the GSS this morning to help analyse how to do BPR reviews. I would also like you all to make a strong contribution - tell me what you think! If you hate the whole process, please let me know. If the BPR reviews are going to work, they have to be organised properly and since all of you have been involved in this process from the beginning you should have some idea about the processes involved, about how they can work, about improvements that can be made, about things that must be included, and so forth. Do not be afraid to criticise anything we have done so far - because we can learn from this.

I have a number of activities lined up for this morning:

What are the key components and activities of a review? What needs to be done? Then, which tools are most suitable to support these activities? Face-to-face? On-line GSS? Email circulation of information? Others?

Identify Critical Success Factors for each activity - what can make an activity fail? Or what is vital to an activity's success?

Structure the activities into steps - start to draw up a framework of activities. Which activities can happen in parallel and which in sequence?

Allocate responsibilities to people so that the activities can be carried out in practice. Which people are most suitable? Those who are already directly involved? Those who will be affected? Outside consultants? People who do not have vested or personal interests and so who can take a more objective view?

Finally, and this may be beyond your existing knowledge:

How should implementation proceed? What barriers to implementation might exist? How should these be tackled?

Appendix 8.6: Team Membership Issues for the Reviewing Process

Ideally, the team members should consist of :

- 1 A mix of management from different departments.
- 2 Volunteers who are interested in the review process and can spare the time to input ideas.
- 3 Practical persons who are aware of the real life situation and can contribute to generate realistic solutions.
- 4 Some fresh staff who can input fresh ideas and are not used to the old systems.
- 5 A group leader who is unbiased and who can facilitate the discussion.

Appendix 8.7: Process Review Steps

- I. Identify current system deficiencies and inefficiencies
 - A. In-person (report directly to the IT committee members)
 - B. Using Group System
 - C. Using a suggestion box
- II. Analyse ALL suggestions (to be completed by the IT committee members)
- III. Consolidate suggestions into projects (to be completed by the IT committee members)
- IV. Set priorities for the projects
 - A. Departmental - to be done by the corresponding department
 - B. Multi-departmental - to be done by the IT committee
- V. Assign each project to co-ordinator(s)
 - A. Departmental - at least one co-ordinator from the corresponding department will be selected/nominated to co-ordinate the project
 - B. Multi-departmental - at least one co-ordinator from each department is to be selected/nominated to co-ordinate the project. Also, one of the co-ordinator is to be designated as the chief co-ordinator for the project.
- VI. Prepare proposal with detailed implementation procedures by the project co-ordinator(s)
- VII. Review, modify if necessary and approve proposal by the IT committee
- VIII. Implementation (to be carried out by the corresponding project co-ordinators(s))
- IX. Evaluation (to be done jointly by the IT committee members and the project co-ordinators)

Appendix 8.8: Billing Process Solutions

Introduction

The purpose of this document is to set out, in practical terms, how the firm should migrate from its existing billing process to that which is specified in the document entitled 'Ideal Billing Process – Overview'. Detailed program specifications and sample reports can be found in the appendices to this document.

This document comprises six sections. First, this section is concerned with introducing the migration strategy and an overview of the ideal solution. One section is devoted to each of the four stages of the ideal billing process. A section on the enquiries, which provide the information required prior to bill initiation, precedes these sections. Each of the subsequent sections follows the same format, with a sub-section relating to each solution.

Migration

Migration should take place in three phases. The final solution will be a fully integrated software application, which accords in full with the ideal process described in the above-mentioned document. However, interim solutions are considered to be necessary to most effectively achieve the final solution. Interim solutions will be provided in two phases. In the first phase, all reasonable actions will be taken that do not involve replacing or modifying the existing Practice Management System (PMS) software. Additionally, departmental billing procedures will be standardised across the firm during the first phase. In the second phase, the PMS will be modified but not replaced. As the interim solutions are adopted, the actual billing process will move progressively towards the ideal one.

Estimated time frames for the three phases are one month, four months and one year respectively, subsequent to approval of this document by the Strategy Review Group (SRG).

Introduction to the Ideal Solution

The ideal physical implementation for the billing process is a fully integrated Billing application running under Windows 95, which is interfaced with the applications used for the management of time, expenses and accounts receivable. The Billing application will be Windows-based and will be fully integrated with Office 97.

On accessing the Billing application the following options will be displayed:

- Enquiry;
- Initiation;
- Review;
- Approval;
- Finalisation;
- Administration.

It should be noted that this document does not cover the Administration option in any detail, as its functionality is not a matter of concern to general users.

Only those options for which the user has authority will be highlighted as available. Enquiry and Initiation will be available to all users. Review will only be available to Partners and Engagement Managers. Approval will only be available to Partners and Finalisation only to Partners' secretaries. Only the EDP Supervisor, the IT Services Manager and the Chief Information Officer will have access to the Administration option, which is used for setting user access rights, database purging and direct database manipulation.

Enquiry

Short Term Interim Solution

As previously mentioned, in this phase all reasonable actions will be taken that do not involve replacing or modifying the existing Practice Management System (PMS) software. Such actions include the standardisation of billing procedures throughout the firm.

To assist with the review of work in progress and unbilled expenses, the following reports will be made available to all users across the network in the form of Excel spreadsheets:

- Work In Progress & Unbilled Expenses Summary By Engagement;
- Accumulated Time Charge Breakdown By Engagement & Staff Member;
- Unbilled Expenses Breakdown By Engagement & Expense Type.

The above reports will be saved in *f:\shared\engage\live* and will be updated on a daily basis. The file names used will be *wip_exp.xls*, *time_stf.xls* and *unb_exp.xls* respectively. Once the firm has been completely upgraded to Office 97, the file names will be changed to those given above. Filters will be automatically provided. A text string search utility will also be provided.

The **Work In Progress & Unbilled Expenses Summary By Engagement** report will comprise the following columns:

- Client Name;
- Client Code;
- Division;
- Job Number;
- Accumulated Time Charges;
- Accumulated Billed Fees;
- Unbilled Time Charges;
- Fee Estimate;
- Total Unbilled Expenses;
- Staff Group Initials;
- Engagement Manager Initials;
- Engagement Partner Initials;
- Contact Partner Initials;
- Billable Flag;
- Status;
- Source Of Referral.

All active engagements will be listed, together with those in suspense. A sample report is given as Appendix 1.

The **Work In Progress Breakdown By Engagement & Staff Member** report will comprise the following columns:

- Client Name;
- Client Code;
- Division;
- Job Number;
- Staff Name;
- Staff Code;
- Accumulated Time Charges.

Data will only be provided in respect of non-zero accumulated time charges. A sample report is given as Appendix 2. In order that the data provided is meaningful, billed fees should be regularly closed out in full: once this has been done, the unbilled time charges will equal the accumulated time charges. This practice will also yield the benefit of enabling the provision of accumulated time charge recovery information on an on-going basis throughout the year.

The **Unbilled Expenses Breakdown By Engagement & Expenses Type** report will comprise the following columns:

- Client Name;
- Client Code;
- Division;
- Job Number;
- Expense Description;
- Expense Code;
- Unbilled Amount.

Data will only be provided in respect of non-zero unbilled amount. A sample report is given as Appendix 3.

Medium Term Interim Solution

In this phase all reasonable actions will be taken that involve modifying, but not replacing, the existing Practice Management System (PMS) software.

To further assist with the review of work in progress and unbilled expenses, the following additional reports, in the form of Excel spreadsheets, will be made available to all users across the network:

- Work In Progress Movement History By Engagement;
- Accumulated Time Charge Movement History By Engagement & Staff Member;
- Unbilled Expenses Movement History By Engagement.

The above reports will be saved in *f:\shared\engage\live* and will be updated on a daily basis. The file names used will be *wip_mvt.xls*, *stf_mvt.xls* and *exp_mvt.xls* respectively. Once the firm has been completely upgraded to Office 97, the file names will be changed to those given above. Filters will be automatically provided.

The **Work In Progress Movement History By Engagement** report will comprise the following columns:

- Client Name;
- Client Code;
- Division;
- Job Number;
- Date;
- Time;
- Movement Type;
- Movement Amount;
- Work In Progress Balance.

Due to the volume of data involved separate reports will be provided for each month and division. A sample report layout is given as Appendix 4. Movement types include Incur, Bill, Close Out Time Charges, Close Out Billed Fees, Transfer In Time Charges, Transfer Out Time Charges, Transfer In Billed Fees, Transfer Out Billed Fees.

The **Accumulated Time Charge Movement History By Engagement & Staff Member** report will comprise the following columns:

- Client Name;
- Client Code;
- Division;
- Job Number;
- Staff Name;
- Staff Code;
- Date;
- Time;
- Movement Type;
- Movement Amount;
- Staff Balance;
- Total Balance.

Due to the volume of data involved separate reports will be provided for each month. A sample report layout is given as Appendix 5. Movement types include Incur, Close Out, Transfer In and Transfer Out.

The **Unbilled Expenses Movement History By Engagement** report will comprise the following columns:

- Client Name;
- Client Code;
- Division;
- Job Number;
- Expense Description;
- Expense Code;
- Date;
- Time;
- Movement Type;
- Movement Amount;
- Expense Type Balance;

- Total Balance.

Due to the volume of data involved separate reports will be provided for each month and division. A sample report layout is given as Appendix 6. Movement types include Incur, Bill, Write Off, Reinstate, Transfer In and Transfer Out.

Long Term Ideal Solution

On entering the Enquiry option, a selection screen will be displayed into which various selection criteria may be entered such as client code, division, job number, Staff Group initials, Engagement Manager initials, Engagement Partner initials, Contact Partner initials, billable flag and status. Any combination of these criteria may be specified. On acceptance, a list of engagements satisfying the entered criteria will be displayed. For each engagement the client name, client code, division, job number, accumulated time charges, accumulated billed fees, unbilled time charges, fee estimate, total unbilled expenses, Staff Group initials, Engagement Manager initials, Engagement Partner initials, Contact Partner initials, billable flag and status will be given. The user may then highlight a single engagement of interest and press the right hand mouse button to reveal a window listing the following set of more detailed enquiry options:

- Accumulated Time Charge Breakdown By Staff Member;
- Unbilled Expenses Breakdown By Expense Type;
- Work In Progress Movement History;
- Accumulated Time Charge Movement History By Engagement & Staff Member;
- Unbilled Expenses Movement History;
- Bill Status By Invoice.

Appendix 10.1: Revised Instrument (Absolute Version)

Part One: Demographics and Attitudes

1 a. Are you Male Female ? (1)

2. Would you describe yourself as:

shy	Agree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree	(2)
apprehensive	Agree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree	(3)
assertive	Agree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree	(4)
confident	Agree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree	(5)

3a. How many meetings of at least 5 people have you participated in during the last week?
_____ (6)

b. Typically what percentage of your working time do you spend in meetings per week? (7)

0-20% 21-40% 41-60% 61-80% 81-100%

4a. To what extent do you like meetings? (8)

Strongly like Strongly dislike

b. How important do you rate meetings to be? (9)

Very Important Not at all important

Part Two: Some questions about this meeting.

5. With regard to your own participation in the meeting, please indicate to what extent you agree with the following statements:

a) *You feel that you played a useful role.* (10, CR1)

Strongly Agree Strongly Disagree

b) *The language of the meeting prevented you from participating.* (11, C1)

Strongly Agree Strongly Disagree

c) *You found it hard to understand other group members when they talked*
(12, C2)

Strongly Agree Strongly Disagree

d) *You experienced problems expressing yourself.* (13, C3)

Strongly Agree Strongly Disagree

e) *You felt reluctant to put forward your own ideas.* (14, C4)

Strongly Agree Strongly Disagree

f) You experienced pressure, either to conform to a particular viewpoint or not to contradict others. (15, S4)

Strongly Agree Strongly Disagree

6. With regard to all meeting members as a whole, how would you rate the discussions in the meeting in terms of the following scales?

Meaningful Meaningless (16, D1)

Appropriate Inappropriate (17, D2)

Open Closed (18, D3)

Imaginative Unimaginative (19, D4)

7. Please indicate to what extent you agree with the following statements:

a) Other members appeared willing to answer questions when asked. (20, T1)

Strongly Agree Strongly Disagree

b) Members worked together as a team. (21, T2)

Strongly Agree Strongly Disagree

c) Members had sufficient access to the information they needed so as to participate actively in and fully understand the meeting. (22, T3)

Strongly Agree Strongly Disagree

d) The time spent in the meeting was efficiently used. (23, E2)

Strongly Agree Strongly Disagree

e) Issues raised in the meeting were discussed thoroughly. (24, E3)

Strongly Agree Strongly Disagree

f) Some group members tried to intimidate others, e.g. by talking loudly, using aggressive gestures, making threats, etc. (25, S1)

Strongly Agree Strongly Disagree

g) Some group members tried to use their influence, status or power so as to force issues on the other group members. (26, S2)

Strongly Agree Strongly Disagree

h) You felt inhibited from participating in the discussion because of the behaviour of other meeting members. (27, S3)

Strongly Agree Strongly Disagree

8. What percentage of meeting time do you think was spent on serious discussion? _____ % (28, E4)

9. To what extent would you say that this meeting was result oriented? (29, E1)

Strongly Result Oriented Weakly Result Oriented

10. How would you rate your overall level of satisfaction with the meeting? (30, CR2)

Strongly Satisfied Strongly Dissatisfied

11. To what extent was consensus achieved in the meeting? (31, CR3)

Strongly Achieved Weakly Achieved

12. How comfortable do you feel using the technology? (Tech 1)

Very Comfortable Very Uncomfortable

13. To what extent did the technology hinder/facilitate your participation in this meeting?
(Tech 2)

Strongly Hindered Strongly Facilitated

13a. Why?

14. Do you have any other comments you would like to make?

Appendix 10.2: Revised Instrument (Relative Version)

1. Are you Male Female ? (1)

2. Would you describe yourself as:

shy	Agree <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree (2)
apprehensive	Agree <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree (3)
assertive	Agree <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree (4)
confident	Agree <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disagree (5)

3a. How many meetings of at least 5 people have you participated in during the last week?
_____ (6)

b. Typically what percentage of your working time do you spend in meetings per week? (7)

0-20% 21-40% 41-60% 61-80% 81-100%

4a. To what extent do you like meetings? (8)

Strongly like Strongly dislike

b. How important do you rate meetings to be? (9)

Very Important Not at all important

5. Compared to previous meetings of this team, do you feel that:

a) *The role you played in this meeting was* (2, CR1)

More useful Stayed about the same Less useful

b) *Your ability to participate in the meeting* (3, C1)

Improved Stayed about the same Deteriorated

c) *Your understanding of the typed comments from other group members* (4, C2)

Improved Stayed about the same Deteriorated

d) *Your ability to express yourself* (5, C3)

Improved Stayed about the same Deteriorated

e) *Your willingness to put forward ideas* (6, C4)

Increased Stayed about the same Decreased

f) *The pressure you experienced, either to conform to a particular viewpoint or not to contradict others* (7, S4)

Increased Stayed about the same Decreased

6. Compared to previous meetings of this team, do you feel the discussions improved, stayed the same or deteriorated on the following scales:

- Meaningful (8, D1) Improved ; Stayed about the same ; Deteriorated
Appropriate (9, D2) Improved ; Stayed about the same ; Deteriorated
Openness (10, D3) Improved ; Stayed about the same ; Deteriorated
Imaginative (11, D4) Improved ; Stayed about the same ; Deteriorated

7. Compared to previous meetings of this team, do you think that:

- a) *The willingness of other members to answer questions when asked* (12, T1)
Increased Stayed about the same Decreased
- b) *The extent to which members worked together as a team* (13, T2)
Increased Stayed about the same Decreased
- c) *The extent to which members had sufficient access to the information they needed so as to participate actively in and fully understand the meeting* (14, T3)
Increased Stayed about the same Decreased
- d) *The time in the meeting was used* (15, E2)
More efficiently As efficiently Less efficiently
- e) *Ideas were discussed* (16, E3)
More thoroughly As thoroughly Less thoroughly
- f) *The extent to which some group members tried to intimidate others, e.g. by talking loudly, using aggressive gestures, making threats, etc.* (17, S1)
Increased Stayed about the same Decreased
- g) *The extent to which some group members tried to use their influence, status or power so as to force issues on the other group members* (18, S2)
Increased Stayed about the same Decreased
- h) *The extent to which you felt inhibited from participating in the discussion because of the behaviour of other meeting members* (19, S3)
Increased Stayed about the same Decreased

8. What percentage of this meeting's time do you think was spent on serious discussion?
_____ % (20, E4)

9. To what extent would you say that this meeting was result oriented? (21, E1)

Strongly Result Oriented Weakly Result Oriented

10. How would you rate your overall level of satisfaction with this meeting? (22, CR2)

Strongly Satisfied Strongly Dissatisfied

11. To what extent was consensus achieved in this meeting? (23, CR3)

Strongly Achieved Weakly Achieved

12. Compared to previous meetings of this team, how do you feel about using the technology? (24, Tech 1)

More comfortable As comfortable Less comfortable

13. Compared to previous meetings of this team do you feel that the technology facilitated your participation in this meeting more or less? (25, Tech 2)

Facilitated more No difference Facilitated less

13a. Why?

14. Do you have any other comments you would like to make?
