



*Vets Helping Vets*

“Building Partnerships for success”

VBA Workshop – 07/07/07

Courtesy of H. W. “Bill” Sparks, Southwest American Graphics, eMail: [hwsparks@sbcglobal.net](mailto:hwsparks@sbcglobal.net) phone: (915) 594-7022

## *Small Meeting Management*

There is a difference between attending a meeting, participating in a meeting, and organizing and conducting a meeting.

Attending a meeting is simple – show up on time, meet with others and enjoy the refreshments. You listen to the speaker and maybe even take a few notes for later use.

But, as a leader, organizing and conducting a meeting is not as simple as it is for those attending.

### *Types of Meetings*

Meetings come in all sizes and shapes. Each meeting is unique and different types of meetings will have different requirements.

*“Never Have A Meeting Without A Purpose”*

There are a few basic types of meetings that community leaders may be asked to organize and conduct. Ask yourself: “Why do I have to have a meeting?” This will help you decide on the type of meeting you need to have.

**Informational Meeting** – This is a meeting where people are assembled to listen to someone give out basic information that they can take back to their own area of responsibility.

**Decision Meeting** – This is a straightforward meeting where people are assembled to make a decision – usually, they have been given information prior to this meeting and should be prepared to make a decision during the meeting.

**Action Meeting** – This will be a working meeting - during this type of meeting, folks may be asked to divide up the responsibilities for actions to be taken in their own areas of responsibilities. This type of meeting may be combined with a Decision Meeting.

**Reporting/Updating Meeting** – This is a meeting where responsible people will report to the team leader or supervisor (or group) on the results of their actions to date. An example of this would be a monthly meeting of committee chairs reporting back to the officers of an association.

### *Simple Meeting Rules*

Here are some simple rules that can be followed to insure the success of a meeting:

**Don't Do It All By Yourself** – all meetings have two basic functions that need to be assigned to someone – the planning and facilitation of the meeting and the actual conduct of the meeting.

This is the most important decision that a leader can make when they have to conduct a meeting.

If you want to chair the meeting or act as Master of Ceremonies, then get someone else to act as meeting planner and to facilitate the meeting.

If you want to plan and facilitate the meeting, then get someone else to chair the meeting or act as Master of Ceremonies.

**Do Not Act As Your Own Facilitator** – have a responsible person assigned to set up the room before hand – things like tables, chairs, audio-visual equipment, environmental controls, refreshments, handouts, etc. The person running the meeting should be free to meet the attendees and as chair, keep the agenda flowing. As a leader conducting a meeting, you should not have to worry over the many details of planning and setting up the meeting. If something goes wrong, you should not have to be pulled away from your duties to handle a problem.

As a leader, you should be greeting attendees and starting and closing the meeting.

**Prepare An Agenda** – An agenda keeps the meeting focused. If possible send the agenda to attendees in advance so they can be prepared and ready to participate when they arrive. Have an agenda placed at every seat so attendees can follow the order of the meeting.

**Keep Meetings Short** – having a definite time schedule and sticking to the agenda will keep the meeting focused – people do not enjoy attending meetings that stray off topic and drag on past the time allotted. Remember that the time people take out of their busy schedule to attend your meeting is valuable to them and should not be wasted.

**Always Start On Time** – it is tempting to wait for the last few attendees that straggle in late before starting the meeting – you should start every meeting on time out of respect for those that arrived on time – if you wait on the late comers, the meeting will start late and end late and frustrate everyone.

### *Sample Agenda*

1. Invocation (optional)
2. Pledge of Allegiance (optional)
3. Recognition of VIP's
4. Go over the Agenda – Stick to the Agenda
5. Break on time
6. End on Time

**Socialize Before or After The Meeting** – if people are coming from different locations to attend the meeting, build in some time for socializing before or after the meeting **NOT** during the meeting. Don't take up the attendee's valuable time by allowing people to socialize over the refreshment table.

### ***Who Should Attend The Meeting?***

Only invite those people to attend a meeting that actually need to be there. It is nice to think of those special people you want to have at your meeting but the question is “what will they get out of the meeting?” Don't waste people's time by having them attend a meeting that does not pertain to them.

A bad example would be to invite department heads to a working meeting where budget items are being discussed between accounting and section leaders – why would department heads take part in a meeting where their subordinates are the functional decision makers?

The opposite would also be a bad example of a meeting - section leaders are asked to attend a meeting where hard decisions are going to be made and they need their department head's approval.

### ***Where Should You Have The Meeting?***

If your business does not have space set aside for meetings beyond a small break room, there are many locations where you can hold meetings of varying size – there are public meeting spaces and there are private meeting facilities.

**Public Meeting Spaces** – here are some ideas for holding small meetings in public facilities:

Libraries – Schools – Churches - local Community Colleges or Universities – Convention Centers – Community Centers - Recreation Centers – Senior Centers – Park Pavilions - Historic Sites - Museums – Government Offices (Federal, State, County, City, etc.)

**Private Meeting Spaces** – here are some of the private meeting facilities that you can use for a meeting:

Restaurants – Hotels – Private Meeting Halls (Ballrooms) – Golf Courses and Country Clubs  
Shopping Centers – Banks – Chamber of Commerce – Corporate Offices

Some additional places to consider would be local private organizations such as the YMCA/YWCA, Boys and Girls Clubs, Elks Lodges, etc.

### ***Setting Up The Meeting Room and Equipment***

As a leader you should be aware of the types of equipment that may be required for the meeting and how to set up a room to insure a successful meeting.

**Audio – Visual Equipment** – Is there a blank wall that can be used for a presentation or do you need a screen? Will a presenter need an overhead projector or a computer? Will you need amplification and a sound system? Is a microphone available? Do you need a wireless system for someone to speak as they walk around the room or will they speak from a podium?

Will there be a need for an easel with paper to write on? Do the attendees have writing pads and pens to take notes? Are the handouts ready for each attendee?

It is always a good idea to have a short biography prepared for the attendees on each speaker. Another helpful tool is to have the speaker prepare a list of sources (books, web sites, etc.) that the attendees can use to get more information after the meeting.

Can everyone see the speaker and the presentation from their seats without having to look around pillars or columns?

Check on the environmental controls BEFORE the meeting – is the room lighting too bright or too dark? Can the lights be dimmed for a presentation? Is it too hot or too cold? Are the bathrooms nearby? Are they accessible to people of special needs?

Is there background noise that will distract everyone?

Where is the door? People walking by will poke their head in and disrupt the meeting – try to arrange the room so that the doors are at the back of the meeting – late arrivals and early departures will tend to disturb everyone if they have to cross the front of the room to get to the door.

**Refreshments** – arrange for a morning service to be stocked until the meal period – nowadays regular coffee, decaf and hot tea and water are the minimum. The afternoon service should include cold drinks, iced tea, and water.

Schedule breaks at logical points (for example: every 1 ½ hours) or, for less formal meetings, allow people to get their own refreshments while the meeting is in progress.

**Seating** – there are several types of seating that can be arranged for different types of meetings.

For larger meetings, some of these are: Banquet Style - Classroom Style – Auditorium Style – Reception Style. All major hotels will be happy to provide a meeting planner kit with suggested layout designs.

For smaller meetings, seating can also be arranged in several different ways: Round tables seat either 8 or 10 and are good for groups that do not need a head table and when workgroups need separate space for breakout during the meeting and you only have one room.

Working arrangements are usually set up in a square pattern – a T pattern or a U shape pattern.

You can see suggested seating arrangements in the meeting planner information found at the Carnegie-Mellon University web site: <http://www.cmu.edu/conferences/facilities/roomStyles.html>

### ***Some Additional Thoughts***

As a leader, it takes all of your time to plan and facilitate a meeting – it is better to task others to act as planners and facilitators – you can use volunteers or professionals – your local Chamber of Commerce or Convention and Visitors Bureau will have a list of professional meeting planners in your area.

## ***Finally...***

When looking for a meeting venue, it is important to consider some key points:

Pick a central location – a place with easy access for people coming from different parts of town

Accessibility – do you have someone with special needs for wide doors, ramps, accessible bathrooms?

Cost – do you have a budget? Public spaces are always less expensive BUT may not have the support needed such as catering or setting up or breaking down a room. Using public spaces may require more volunteers.

For larger meetings, professional planners save time and require less effort on behalf of the organization to coordinate all aspects of a meeting: Invitations – media announcements - transportation – receptions – sign-in tables – set ups – meals – speakers – entertainment, etc.

When planning a meeting, here are some additional considerations to help insure a successful meeting.

What if you have to have more than one function during the meeting? First a short meeting – some work session break outs – a meal – and then everyone return to a final gathering? It is best to plan for more than one room – move from the meeting room to the break outs – it makes for better control. The meeting room can be converted to a meal room while the break outs are taking place. During the second break out after lunch, the meal room can be converted back to the final meeting area.

## ***Successful Meetings***

***Successful meetings have a purpose.***

***They have the right people attending.***

***They start on time and they end on time.***

***Everybody gets something out of a successful meeting.***

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