



**BSB40215 - Certificate IV in Business
Study Support materials for**

BSBADM405 - Organise Meetings



STUDENT HANDOUT

BSBADM405 Organise meetings

This unit describes the skills and knowledge required to organise meetings including making arrangements, liaising with participants, and developing and distributing meeting related documentation.

It applies to individuals employed in a range of work environments who are required to organise a variety of meetings. They may provide administrative support within an enterprise, or have responsibility for these tasks in the context of a particular team, workgroup or project.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
<i>Elements describe the essential outcomes.</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>
1 Make meeting arrangements	1.1 Identify the type of meeting being organised and its purpose 1.2 Identify and comply with any legal or ethical requirements 1.3 Identify requirements of the meeting and its participants 1.4 Make meeting arrangements in accordance with meeting and participants requirements 1.5 Advise participants of meeting details
2 Prepare and distribute documentation for meetings	2.1 Prepare notice of meeting, agenda and meeting papers in accordance with meeting requirements 2.2 Check documentation for accuracy and correct any errors 2.3 Distribute documentation to participants within designated timelines 2.4 Prepare spare sets of documents
3 Record and produce minutes of meeting	3.1 Take notes with the required speed and accuracy to ensure an accurate record of the meeting 3.2 Produce minutes that reflect a true and accurate account of the meeting 3.3 Check minutes for accuracy and submit for approval by the nominated person 3.4 Dispatch copies of minutes within designated timelines

Organising Successful Meetings

Whatever your group does, good meetings are vital to working together well. Meetings make all the difference between a motivated and dynamic group or one feeling lethargic and lost.

Meetings that work for everyone involved will make your group more effective and more fun. Below are some basic steps that you can take to make your meetings work well and be fun. *For more ideas and an in-depth discussion of the issues involved take a look at our other briefings that you can find on our website.*

Before the meeting

There are many different kinds of meeting – your meeting could be a one-off event to provide information on climate change; to start a campaign or to plan an action. It might be a regular meeting of a well-established group, discussing day-to-business, or a specially called meeting to deal with a conflict within the group.

Whatever the meeting it will benefit hugely from a little bit of planning and preparation.

You need to be clear what the purpose of the meeting is. Writing down and displaying the purpose (eg: on flipchart paper) in a clear and concrete sentence at the beginning of the meeting can help to keep people focussed.

There may of course, be several purposes for the meeting, eg: planning an action; attracting new members to the group and day to day tasks such as discussing finance.

The next step is to think about what this particular meeting requires to work well.

When will it happen:

Try to find a time that most people are able to make. Think about patterns of daily activity, such as parenting, work, dinner time. If lots of people won't be able come at the same time why not hold two meetings?

Find a venue:

The venue needs to be big enough to accommodate everyone comfortably, but not too big. It can be very disempowering when you have hired a huge hall and only twenty people turn up.

Ensure the venue for your meeting is accessible - can someone in a wheelchair, or with hearing difficulties participate as easily as possible? Does the venue itself put some people off (pubs and venues with religious affiliations can have this effect) and finally, have you put clear directions on your publicity? For more information on accessibility take a look at our briefing Access Issues at Events.

Letting people know about the meeting

You will need to invite people to the meeting. In a closed group it might be enough tell all members of the group. If you want to attract new people then you need to get thinking about publicity (see also our guide on Good Publicity and Outreach). The following are some tips to think about when advertising a meeting.

- **Think about who you are aiming to invite** and how best to tell them about it. The publicity needs to be placed where they can see it. For a meeting about new cycle paths you could put up posters in bike shops and on lampposts along cycle routes as well as trying to get articles in the local newspaper and local radio.

- **Is your publicity explicitly welcoming people?** Does it encourage people to get involved, to offer their own ideas? Think about the image you are presenting - work on being friendly, interesting and active.
- Make sure to **include all the important details**: where, when, what the purpose of the meeting is, who is organising it and contact details including a telephone number.
- **Don't rely totally on email** to send out invites unless you are certain that everyone has internet access and checks it regularly.
- Many groups decide the time and place of the next meeting at the end of the current one. If that's all the publicity you normally do, at the very least remember to **contact the 'regulars'** that couldn't make that meeting.
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Planning the meeting

It's a good idea to think in advance about the agenda, facilitation and decision making processes you could use in the meeting, especially when organising a large public meeting, or one dealing with difficult issues or conflict. It may be useful to prepare a rough agenda and think about the order in which to proceed. Remember that this is only a rough proposal - do let people participate by adding to the agenda and prioritising it before or at the start of the meeting. This will help them feel more involved with the meeting.

An important role that needs to be filled in all but very small meetings is that of the **facilitator**. The facilitator helps the group to have an efficient and inclusive meeting by getting everyone to decide on and keep to a structure and process for the meeting. She/he keeps the meeting focussed and regulates the discussion. For more about this role please read our briefing *Facilitation of Meetings*. You could decide who will facilitate at the start of the meeting. However finding a facilitator a few days before or at the previous meeting allows the facilitator time to prepare themselves. This can be especially useful if it's an important or big meeting.

All this might sound like a lot of work, but if you share out jobs and work jointly with someone else it will reduce stress levels. You'll probably be able to learn something from the other organisers and have fun too.

During the meeting

- **Arrange seating** in an inclusive way, so that everyone can see one another - circles are best for this, but aren't suitable for all groups. **Welcome everyone** as they arrive and find out who they are. Introduce yourselves. Some groups designate a welcomer or 'doorkeeper' for newcomers. This ensures that everyone is greeted by a friendly face, knows where the

toilets, refreshments and fire exits are, as well as being brought up to speed with the meeting progress if they arrive late.

- **Start the meeting by asking everyone to introduce themselves:** to say a bit about themselves or why they are here, not just give their names. Try an *icebreaker* appropriate to the group. This can be as simple as telling the group your name and using an alliterative adjective to describe yourself, eg: "I'm mighty Muzammal", "I'm happy Huw" and so on.
- **Make sure people know how the meeting works** - how are decisions made: by consensus or voting? What kind of behaviour is acceptable in this meeting and what isn't? It can be helpful to make this 'formal' by using a group agreement. See our briefing on Facilitation of Meetings for more on this.
- **Agree on an agenda.** You might have prepared a rough proposal, if so, ask everyone to check and add to it. Then, as a group, decide on priorities. You could tackle difficult issues in the middle so people have had a chance to warm up, but are not yet tired. Maybe some of the points can be discussed in smaller working groups.
- **Agree on a time to finish** and when to have breaks. Have breaks to revive people (for drinks, toilet, cigarettes) and for informal chatting, especially if the meeting lasts longer than 1½ hours.
- **Make sure everyone can see the agenda** - display it on a large sheet of paper. Flipchart paper or the back of a roll of wallpaper are ideal for this. You can cross off points once they are dealt with as a visual reminder that the meeting is getting things done.
- **Take one point at a time**, and make sure the group doesn't stray from that point until it has been dealt with. A common way of starting is to recap recent events or the last meeting. Summarise regularly and make clear decisions with action points (don't forget to note who's doing what, and by when) to be carried out by a variety of people.
- **Don't let the same people take on all the work** - it can lead to tension and informal hierarchies within the group. Encourage everyone to feel able to volunteer for tasks and roles. It can help if the more experienced members of the group offer to share skills and experience.
- **Encourage participation** at all times so that everyone can get involved and contribute to the meeting. This can be helped by using tools such as ideastorming, go-rounds, and small groups.
- **Challenge put downs** and discriminatory remarks.
- **Don't let the same few people do all the talking** or let everyone talk at the same time. Tools such as go-rounds and talking sticks can help to regulate the flow of discussion.

- **Don't let the meeting get too heated** - have breaks for cooling off or split into pairs or small groups to diffuse tension.
- Try to keep discussions positive, but don't ignore conflict - deal with it before it grows.

Ending the meeting

- Make sure the meeting finishes on time, or get everyone's agreement to continue.
- Pass round a list for people to add their contact details so that you can send out minutes and inform people about future meetings.
- Decide on a date, time and venue for the next meeting.
- You might also want to decide on points to be discussed at the next meeting.
- Remember to thank everyone for turning up and contributing.
- It can be nice to follow the meeting with an informal social activity like sharing a meal or going to the pub or a café. Think about any special needs - not everyone drinks alcohol, you might have vegetarians or vegans in your group and so on, so try to choose an inclusive venue or activity.
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After the meeting

Send minutes to everyone who was at the meeting and don't forget those people who could not make it, but would like to be kept informed. In the minutes be sure to include any action points as well as thank people for their contributions.

Evaluating your meetings can help to constantly improve them. It's a good idea to leave a few minutes at the end of every agenda and ask the group what went well and what needs to be improved. You could also get together afterwards with the other organisers to evaluate the meeting. Remember to celebrate what you have achieved!

Tools for involving people in meetings

Here are a few simple tools you can use to involve people more in the meeting. For more ideas please have a look at our briefing on Tools For Meetings and Workshops.

Go-round - everyone takes a turn to speak without interruption or comment from other people. This tool can be used in many situations - for the initial gathering of opinions and ideas, to find out people's feelings, to slow down the discussion and help improve listening.

It helps to establish clearly what the purpose or question of the go-round is - it may help to write it on a large sheet of paper for everyone to see. If your aim is to give everyone an equal say you can set a time limit for each person. If your primary concern is to air the issue it may be better to let people speak for as long as they want.

Ideastorm - this tool helps to quickly gather a large number of ideas. It encourages creativity and can free energy. Start by stating the issue to be ideastormed then ask people to say whatever comes into their heads as fast as possible without censoring it - the crazier the ideas the better. This helps people to be inspired by each other's ideas. There should be one or two note takers to write all the ideas down where everyone can see them. Make sure there is no discussion or comment on others' ideas - be especially vigilant about put downs or other derogatory remarks: structured thinking and organising come afterwards.

Once you have your ideas then you can start looking through the results - you may need to prioritise from the many options generated by the ideastorm - you can get ideas on how to prioritise from our Tools for Meetings and workshops briefing.

Mapping - using large writing on flip chart paper where everyone can see it and arrange key words in groups or out on their own. Connecting arrows, colours, pictures make this a lot more organic and fun than a simple list and it can allow people to make new connections. The writing could be done by one person or everyone in the group.

Splitting into smaller groups or pairs - there are lots of reasons to split into a smaller group for a discussion or a task: it can sometimes become difficult to discuss emotionally charged issues in a large group, or a large group may become dominated by a few people or ideas, stifling creativity and contributions from others.

Apart from these examples, many topics can be discussed more effectively in a smaller task group, and need not involve everyone - for example the details of lay-outing the newsletter or organising the benefit-gig. Smaller groups allow time for everyone to speak and to feel involved. They are a lot less intimidating and can provide a much more supportive atmosphere in which less assertive people feel more confident in expressing themselves. Think about the sort of group you need - a random split (eg numbering off) or specific interest groups? Explain clearly what you want groups to do. Write specific questions and topics on a flipchart beforehand and give them to each group. If you are going to have feedback at the end, you need to say clearly what they need to feed back. You could also ask people to split into pairs.

Energisers - when people stop concentrating or become irritable in a meeting it can simply mean they have been sitting and listening for too long. Simple things like a stretch, a game, or two minutes chatting to the next person can re-energise people. If you suggest a short game then do be sensitive about your participants - the aim is to get their attention focussed again afterwards, not to

embarrass them or make them feel isolated. Never coerce people into playing games but respect their limits and boundaries.

Talking sticks - you can use a stick or a conch shell or almost any other distinctive object. The idea is that people may speak only when they hold the 'talking stick'. When finished the speaker passes the stick to next person who wants to speak. This tool makes people conscious of when they interrupt others and helps them to break the habit. It also allows people to consider and take their time in voicing their views as they don't have to be afraid that some one else might jump in.

<http://www.seedsforchange.org.uk/meeting>

Organise a meeting at your workplace

Organise a formal meeting

Think about a meeting you attended where everything went well. Identify what made the meeting successful.

Think about a meeting you attended that ran poorly and failed to achieve its objectives. Identify what made the meeting unsuccessful.

Share your thoughts with others by posting your comments to the ValleyView Meeting room under the heading *Successful meetings*.

You are required to compile a portfolio of evidence of your completion of all of the tasks ahead for submitting to your teacher. The details of what your portfolio should contain can be downloaded in the portfolio checklist at the bottom of the page. Arrange your portfolio using the following headings:

- Formal meeting
- Standing committee meeting
- Chair a meeting.

Organise a formal meeting

In conjunction with your teacher and workplace supervisor, organise a formal meeting, such as an annual general meeting or board meeting for you workplace. Organising the meeting should entail:

- developing the agenda
- identifying the appropriate participants
- arranging the time and venue for the meeting and notifying the participants
- preparing the meeting papers
- ensuring that the meeting papers are dispatched on time.

Follow-up after the meeting should entail:

- recording, circulating and filing the minutes

- recording and reporting outcomes of the meeting to management.

All tasks must be completed within appropriate timelines (to be negotiated with your teacher).

To show that you have completed all requirements, you must submit a portfolio of documents to your teacher. The folder may be in any format, but should include a notice of meeting, agenda and associated papers, minutes, related correspondence and timelines for administrative tasks such as room bookings.

Manage a standing committee meeting

Organise a meeting of an ongoing group or a standing committee, such as an occupational health and safety committee. The meeting may be in any format: face-to-face, videoconference, teleconference, real-time chat (or a mix of these) and must include at least six people.

Submit a meeting proposal to your teacher for approval. Your proposal should include:

- the purpose of the meeting
- notice of meeting and agenda
- list of participants
- time and venue for the meeting
- associated correspondence
- timelines for associated tasks such as room bookings.

Following approval from your teacher, attend the meeting and take minutes. Follow-up after the meeting should entail:

- recording, circulating and filing the minutes
- recording and reporting outcomes of the meeting to management.

All tasks must be completed within appropriate timelines (to be negotiated with your teacher).

Submit the minutes of the meeting as part of your portfolio.

Chair a meeting

Arrange to chair a structured meeting in your workplace. This may be an ad hoc meeting (for example, a meeting to resolve a work-related issue) or the meeting of a regular or standing committee. The meeting may be in any format: face-to-face, videoconference, teleconference, real-time chat (or a mix of these), and must include at least six people and a minimum of six agenda items.

Submit a meeting proposal to your teacher for approval. Your proposal should include:

- the purpose of the meeting
- the notice of meeting and agenda
- the participants
- the time and venue for the meeting

- associated correspondence
- timelines for associated tasks such as room bookings
- a description of how you will conduct the meeting, including the degree of formality and decision-making protocols.

Following approval from your teacher, chair the meeting and arrange for someone to take minutes.

Arrange for at least two people at the meeting to complete a meeting evaluation checklist.

Download the evaluation checklist, available below in PDF and RTF formats.

https://www.dlsweb.rmit.edu.au/toolbox/busadmin/tasks/task_01/sit01/workplac.htm

MEETING EVALUATION CHECKLIST

Make copies of this sheet and distribute to at least three people at the meeting you chair.

Chairperson's name _____

Evaluator's name _____

Evaluator's contact details _____

MEETING DETAILS

Date and time of meeting _____

Place of meeting _____

No. of people attending meeting _____

Duration of meeting _____

Please evaluate the chairperson's effectiveness in running the meeting. Indicate whether you agree or disagree with each statement by marking a box.

	Strongly agree	Agree	Disagree	Not applicable
The meeting started on time.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The meeting kept to the agenda.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The meeting was conducted within appropriate time limits.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The meeting discussion kept to the agenda.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
All participants in the meeting were given the opportunity to express themselves.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The chairperson used appropriate strategies to allow and encourage all participants to contribute to the discussion.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

The chairperson used appropriate strategies for decision-making.	⑥	⑥	⑥	⑥
The degree of formality was appropriate for the context of the meeting.	⑥	⑥	⑥	⑥
The objectives of the meeting were achieved.	⑥	⑥	⑥	⑥

Please provide additional comments about the organisation and conduct of the meeting. Include any suggestions for improvement.

Thank you for your assistance in evaluating the chairperson. Please sign and return this sheet to the person who chaired the meeting.

Signature _____



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MEETING CHECKLIST—SELF-ASSESSMENT

To be completed by the person chairing the meeting.

Chairperson's name _____

Contact details _____

MEETING DETAILS

Date and time of meeting _____

Place of meeting _____

No. of people attending meeting _____

Duration of meeting _____

What was the purpose of the meeting?

Was this purpose achieved? Why? Why not?

Did the meeting keep to the agenda? Why? Why not?

Did the meeting keep to the time limit? Why? Why not?

Did everyone contribute to the discussion? Why? Why not?

Were you satisfied with how you dealt with difficulties or tensions during the meeting?
Why? Why not?

Were you satisfied with your performance as chairperson? What would you change next time?

Submit this self-assessment to your online tutor, along with the evaluation checklists from at least two others who were at the meeting.

Signature _____