

S320: Plan and organise meetings

Overview: Plan and organise meetings, ensuring the necessary activities are carried out before, during and after the meeting.

Links: Events and Meetings; Communications

Specific skills:

- Communicating
- Checking
- Evaluating
- Interpersonal skills
- Managing resources
- Managing time
- Negotiating
- Organising
- Planning
- Problem-solving

Performance Indicators

Before the meeting

1. Plan and agree the meeting brief
2. Agree a budget for the meeting, where appropriate
3. Organise and confirm venue, equipment and catering requirements
4. Agree and prepare agenda and meeting papers
5. Invite attendees, confirm attendance and identify any special requirements
6. Make sure attendees' needs are met
7. Collate and dispatch papers for the meeting within agreed timescales
8. Make sure the chair receives an appropriate briefing
9. Arrange the equipment and layout of the room
10. Arrange catering, if appropriate
11. Make sure someone has been nominated to take minutes, if required

At the meeting

12. Make sure attendees are welcomed and receive suitable refreshments
13. Make sure attendees have the papers and other resources they need
14. Provide information, advice and support when required

After the meeting

15. Evaluate and maintain a record of external services, where these have been used
16. Collect and evaluate participant feedback from the meeting and share the results with relevant people
17. Agree learning points and use these to improve the organisation of future meetings

Knowledge & Understanding

- A. How to plan meetings that meet agreed aims and objectives
- B. The different types of meetings and their main features
- C. The purpose and benefits of planning and agreeing a brief for the meeting
- D. The role of the person organising the meeting
- E. How to identify suitable venues for different types of meetings
- F. The types of resources needed for different types of meetings
- G. Health, safety and security requirements when organising meetings
- H. The main points that should be covered by an agenda and meeting papers
- I. The types of information attendees will need
- J. Any special requirements that attendees may have and how to meet them
- K. The benefits of briefing the chair in advance of the meeting
- L. The purpose of welcoming and providing suitable refreshments to attendees
- M. The types of information, advice and support that may be asked to be provided during meetings
- N. The types of problems that may occur during meetings and how to solve these
- O. How to record and follow up actions
- P. How to evaluate external services
- Q. Different ways to collect and evaluate participant feedback from the meeting
- R. How to agree learning points to improve the organisation of future meetings