

## F2H2 04 (CFAMLD11) Lead Meetings

### Overview

#### What this Unit is about

This Unit is about leading meetings in order to achieve their objectives, which may be to solve problems, take decisions, consult with people or to exchange information and knowledge.

#### Who is the Unit for?

The Unit is recommended for managers at all levels.

#### Links to other Units

This Unit is linked to Units **D12. Participate in meetings**, **E10. Take effective decisions** and **E11. Communicate information and knowledge** in the overall suite of National Occupational Standards for Management and Leadership.

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### **Skills**

Listed below are the main generic 'skills' that need to be applied in leading meetings. These skills are explicit/ implicit in the detailed content of the Unit and are listed here as additional information.

- ◆ Building consensus
- ◆ Communicating
- ◆ Consulting
- ◆ Decision-making
- ◆ Information management
- ◆ Involving others
- ◆ Leadership
- ◆ Obtaining feedback
- ◆ Planning
- ◆ Presenting information
- ◆ Providing feedback
- ◆ Setting objectives
- ◆ Time management

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### Performance Criteria

*You must be able  
to:*

- 1 Establish the purpose and objectives of the meeting and confirm that a meeting is the best way to achieve these objectives.
- 2 Prepare carefully how you will lead the meeting and identify who needs to participate.
- 3 Invite participants, giving them sufficient notice to enable them to attend and stating:
  - ◆ the importance of the meeting
  - ◆ the role they will be expected to play, and
  - ◆ the preparation they need to do.
- 4 Circulate relevant information in advance and, if required, brief participants individually on the content and purpose of the meeting and their roles.
- 5 Set a fixed time for the meeting to begin and end and allocate time appropriately for each agenda item.
- 6 State the purpose of the meeting at the start and check that all participants understand why they are present.
- 7 Clarify specific objectives at the beginning of each agenda item.
- 8 Encourage all participants to make clear, concise and constructive contributions from their perspectives, whilst acknowledging and building on the contributions of other participants.
- 9 Discourage unhelpful comments and digressions, refocusing attention on the objectives of the meeting.
- 10 Manage time flexibly, giving more time to particular agenda items, if necessary, whilst ensuring key objectives are met and participants are kept informed of changes in the agenda.
- 11 Summarise the discussion at appropriate times and allocate action points to participants at the end of each agenda item.
- 12 Take decisions within the meeting's authority, remit or terms of reference.
- 13 Observe any formal procedures or standing orders that apply to the meeting.
- 14 Check that decisions and action points are accurately recorded and promptly communicated to those who need to know.
- 15 Evaluate whether the purpose and objectives of the meeting have been achieved and how future meetings could be made more effective.

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### **Behaviours**

*You will exhibit the following behaviours:*

- 1 You address multiple demands without losing focus or energy.
- 2 You show respect for the views and actions of others.
- 3 You present information clearly, concisely, accurately and in ways that promote understanding.
- 4 You listen actively, ask questions, clarify points and rephrase others' statements to check mutual understanding.
- 5 You show integrity, fairness and consistency in decision-making.
- 6 You make best use of existing sources of information.
- 7 You check the validity and reliability of information.
- 8 You present ideas and arguments convincingly and in ways that strike a chord with people.
- 9 You articulate the assumptions made and risks involved in understanding a situation.
- 10 You take timely decisions that are realistic for the situation.

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### Knowledge and Understanding

*You need to know and understand:*

### General Knowledge and Understanding

- 1 The importance of establishing the purpose and objectives of the meeting and how to do so.
- 2 The importance of confirming a meeting is the best way to achieve these objectives.
- 3 The importance of preparing how you will lead the meeting and how to do so.
- 4 How to identify who needs to participate in the meeting.
- 5 The importance of inviting participants, giving them sufficient notice to enable them to attend.
- 6 The importance of informing participants of the role they will be expected to play, the preparation they need to do and the importance of the meeting.
- 7 How to identify relevant information participants require in advance of the meeting.
- 8 The importance of circulating relevant information in advance and, if required, briefing participants individually on the content and purpose of the meeting and their roles.
- 9 The importance of setting a fixed time for the meeting to begin and end and allocating time appropriately for each agenda item.
- 10 How to allocate time appropriately for each agenda item.
- 11 The importance of stating the purpose of the meeting at the start and checking that all participants understand why they are present.
- 12 The importance of clarifying specific objectives at the beginning of each agenda item.
- 13 The importance of encouraging all participants to make clear, concise and constructive contributions from their perspectives, whilst acknowledging and building on the contributions of other participants, and how to do so.
- 14 The importance of discouraging unhelpful comments and digressions, refocusing attention on the objectives of the meeting, and how to do so.
- 15 How to manage time flexibly, giving more time to particular agenda items, if necessary, whilst ensuring the key objectives are met and participants are kept informed of changes in the agenda.

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### **General Knowledge and Understanding (cont)**

- 16 The importance of summarising the discussion at appropriate times and allocating action points to participants at the end of each agenda item and how to do so
- 17 The importance of taking decisions within the meeting's authority, remit or terms of reference and how to do so.
- 18 The importance of checking that decisions and action points are accurately recorded and promptly communicated to those who need to know.
- 19 How to evaluate whether the purpose and objectives of the meeting have been achieved and how future meetings could be made more effective.

## **F2H2 04 (CFAMLD11) Lead Meetings**

### **Knowledge and Understanding**

*You need to know and understand:*

### **Industry/sector specific Knowledge and Understanding**

- 1 Industry/sector requirements for leading meetings.

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### Knowledge and Understanding

*You need to know and understand:*

### Context specific Knowledge and Understanding

- 1 The people who need to participate and the roles they will be expected to play.
- 2 The types and sources of information required in advance of the meeting.
- 3 The meeting's authority, remit or terms of reference.
- 4 Any formal procedures or standing orders that apply to the meeting.
- 5 The people who are affected by the decisions and need to know about them.

### Evidence Requirements

*To achieve this Unit you will need to ensure that your evidence covers all Performance Criteria, behaviours and Knowledge and Understanding.*

The following table provides you with possible examples of evidence.

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### Evidence Requirements

PC	Evidence of Performance Criteria: ◆ possible examples of evidence	Behaviours	Knowledge and Understanding		
			General	Industry specific	Context specific
<b>Records of preparatory activities arranging and organising meetings</b>					
PC1 PC2 PC3 PC4 PC5	◆ notes, emails, memos and letters relating to preliminary meetings, discussions and consultations about the need for a meeting, its purpose, content, location timing and participants	1, 2, 3, 4, 5, 6, 7	1, 2, 4	-	1, 2
	◆ invitations to people to participate in meetings, and notes of discussions, emails, memos and letters to confirm their attendance and any specific contribution, role or special requirements they may have	3, 5, 6, 8	1, 3, 4, 5, 6	-	1, 2
	◆ notes of discussions, letters, memos or e-mails and copies of orders or forms confirming the reservation of rooms, equipment and catering arrangements	3	9	-	1, 2
	◆ agenda, papers, copies of presentations circulated before the meeting	3	7, 8, 9, 10	1	1, 2
	◆ personal statement (your reflections on your role in arranging and organising meetings)	1, 2, 3, 4, 5, 6, 7, 8, 9, 10	1, 2, 3, 4, 5, 6, 7, 8, 9	1	1, 2
	◆ witness statement (comments on your role in arranging and organising meetings)	1, 2, 3, 4, 5, 6, 7, 8, 9, 10	-	-	-
<b>Records of your leading of meetings</b>					
PC6 PC7 PC8 PC9 PC10 PC11	◆ recordings, notes and minutes of meetings; action plans and other records of planned follow-up activity	2, 3, 5, 8, 9, 10	9, 10, 11, 12, 13, 14, 15, 16, 17, 18	1	5
	◆ copies of relevant constitutions, standing orders, formal authorisation or terms of reference for the meeting	6, 7	17, 18	1	3, 4
	◆ personal statement (your reflections on your role in leading meetings)	2, 3, 5, 7, 8, 9, 10	9, 10, 11, 12, 13, 14, 15, 16, 17, 18	1	3, 4, 5
	◆ witness statement (comments on your role in leading meetings)	2, 3, 5, 8, 9, 10	-	-	-

PC	Evidence of Performance Criteria: ♦ possible examples of evidence	Behaviours	Knowledge and Understanding		
			General	Industry specific	Context specific
PC15	<b>Records of your actions following on from meetings</b>				
	♦ evaluations or reports of meetings, completed action plans and other evidence that the purpose of the meeting has been met	2, 3, 5, 7, 8, 9, 10	19	-	5
	♦ personal statement (your reflections on your role in following-up on meetings)	2, 3, 5, 7, 8, 9, 10	19	-	5
	♦ witness statement (comments on your role in following-up on meetings)	2, 3, 5, 7, 8, 9, 10	-	-	-





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**Notes/Comments**

The candidate has satisfied the assessor and internal verifier that the performance evidence has been met.

**Candidate's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Assessor's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Internal verifier's signature** \_\_\_\_\_ **Date** \_\_\_\_\_