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### 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:

1. communicating
2. checking
3. evaluating
4. interpersonal skills
5. managing resources
6. managing time
7. negotiating
8. problem solving
9. organising
10. planning

# CFABAA412

## Plan and organise meetings

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### Performance criteria

*You must be able to:*

#### **Before the meeting**

- P1 plan and agree the meeting brief
- P2 agree a budget for the meeting, where appropriate
- P3 organise and confirm venue, equipment and catering requirements
- P4 agree and prepare agenda and meeting papers
- P5 invite attendees, confirm attendance and identify any special requirements
- P6 make sure attendees' needs are met
- P7 collate and dispatch papers for the meeting within agreed timescales
- P8 make sure the chair receives an appropriate briefing
- P9 arrange the equipment and layout of the room
- P10 arrange catering, if appropriate
- P11 make sure someone has been nominated to take minutes, if required

#### **At the meeting**

- P12 make sure attendees are welcomed and receive suitable refreshments
- P13 make sure attendees have the papers and other resources they need
- P14 provide information, advice and support when required

#### **After the meeting**

- P15 evaluate and maintain a record of external services, where these have been used
- P16 collect and evaluate participant feedback from the meeting and share the results with relevant people
- P17 agree learning points and use these to improve the organisation of future meetings

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### Knowledge and understanding

*You need to know and understand:*

- K1 how to plan meetings that meet agreed aims and objectives
- K2 the different types of meetings and their main features
- K3 the purpose and benefits of planning and agreeing a brief for the meeting
- K4 the role of the person organising the meeting
- K5 how to identify suitable venues for different types of meetings
- K6 the types of resources needed for different types of meetings
- K7 health, safety and security requirements when organising meetings
- K8 the main points that should be covered by an agenda and meeting papers
- K9 the types of information attendees will need
- K10 any special requirements that attendees may have and how to meet them
- K11 the benefits of briefing the chair in advance of the meeting
- K12 the purpose of welcoming and providing suitable refreshments to attendees
- K13 the types of information, advice and support that may be asked to be provided during meetings
- K14 the types of problems that may occur during meetings and how to solve these
- K15 how to record and follow up actions
- K16 how to evaluate external services
- K17 different ways to collect and evaluate participant feedback from the meeting
- K18 how to agree learning points to improve the organisation of future meetings

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## Plan and organise meetings

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<b>Developed by</b>	Skills CFA
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<b>Version number</b>	1
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<b>Date approved</b>	April 2010
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<b>Indicative review date</b>	April 2012
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<b>Validity</b>	Current
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<b>Status</b>	Original
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<b>Originating organisation</b>	Skills CFA
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<b>Original URN</b>	BAA412
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<b>Relevant occupations</b>	Business, Administration and Law; Administration; Administration and Secretarial Occupations
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<b>Suite</b>	Business and Administration NOS (2010)
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<b>Key words</b>	business, administration, meetings
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