



2015-2016

**Meeting Management:
Steps to Success**

An LCI Leadership Development webinar

Webinar Participant Workbook

Meeting Management: *Steps to Success*

Webinar Background

Running effective and efficient meetings is critical to club productivity and member satisfaction, and an indispensable pillar of good leadership. In this webinar we will discuss the components of effective meeting management which include meeting preparation, managing discussions and decisions, post-meeting evaluation and post-meeting follow up. In addition we will review the available LCI resources for improving meeting management skills.

Learning Objectives--participants will explore how to:

- ✓ Prepare for a meeting
- ✓ Employ standard meeting procedure
- ✓ Facilitate discussion with diplomacy
- ✓ Track follow up action items
- ✓ Self-evaluate for future improvement
- ✓ Access related LCI club resources

How to use this workbook:

- This workbook is meant as an interactive part of the webinar experience. In the pages that follow, selected slide content (not all) appears in the same chronological order as the presentation so that you can follow along between the workbook and the presentation and takes notes if desired. Therefore you may want to print a copy so you can use the workbook in this manner. This is a “writable pdf” book so you can type notes in electronically if so desired.
- At points during the presentation, you may be asked to write your thoughts on the topic being discussed on a particular slide. We have provided you space in the workbook to do so, and the presenters will prompt you when it is time to participate in the exercise.
- The webinar stays within a 60 or 75 minute time frame, so the presentation may move forward before you have had time to complete your ideas; you can always return to the workbook after the webinar is over. The workbook is intended as a tool and a reference, not an “assignment.”
- In addition, we may have hyperlinked related documents and websites in this workbook. When a hyperlink exists, the words that contain the hyperlink to the related webpage will appear as blue and underlined. Click these blue and underlined words to be taken to the resource.
- Enjoy the webinar!



- Facilities
- Advance notice
- Agenda
- Information
- Attendance sign-in sheet
- Introduction information for guests
- Recognition
- The Art of Recognition

Discussion: Problems due to lack of preparation?

Meeting Preparation Checklist

Step	Notes	Complete (✓)				
1. Determine meeting goals and desired outcomes						
2. Determine actions to meet outcomes						
3. List agenda items & responsibilities	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Agenda item</td> <td style="width: 50%;">Person responsible</td> </tr> <tr> <td style="height: 100px;"></td> <td></td> </tr> </table>	Agenda item	Person responsible			
Agenda item	Person responsible					
4. List invited guests						
5. Set timeframe	Date confirmed: Start time: End time:					
6. Finalize logistics (as needed)	Location and room: Materials: Equipment: Food and beverage:					
7. Create agenda	(See sample agenda)					
8. Communicate with members and speakers	Agenda and supporting materials sent? Speakers prepared?					
9. Set up room	Check seating: Put out materials: Check equipment functioning: Check lighting, heating/air-conditioning, etc.					
10. Prepare yourself	(This final step is the MOST important! Even if other things go wrong, your meeting will be successful if YOU are prepared!) Organize materials Sequence speaking notes Think positive thoughts					

Sample Meeting Agenda

Item	Details	Approximate time
Call to order by president		7:00 pm
Introduction of guests	Past District Governor Lee Mayor Armstrong Lion XXX from _____ Mrs. Pierce from local high school	7:05 pm
Reading and approval of minutes of previous meeting		7:10 pm
Program	Guest Speaker: Mrs. Pierce discussing possibility of Leo club at local school and describing existing service projects of students	7:15 pm
Old or unfinished business	Continue discussion of project for elderly Report on results of fund raiser Report on activities of membership committee	7:30 pm
New business	Discussion of potential Leo club Other	7:50 pm
Recognition	Recognize efforts of fundraising chairperson and committee	8:25 pm
Adjournment	Announcement of next meeting time/place	8:30 pm



2: procedure

WHAT: Set of rules customs and ethics that govern meetings.

WHY?

- Every member has equal rights
- The will of the majority is carried out
- Minority heard and protected
- Only one topic considered at a time

Procedure Includes:

- Standard procedures such as Roberts Rules of Order
- Clear, concise motions
- Board meeting alternative for business decisions



3: facilitation

WHAT: Meeting moderation

WHY?

- Stay on task and complete agenda
- Prevents meeting “hijacking”
- Majority can arrive at agreements, decisions, next steps

A good meeting facilitator will:

- ✓ Start on time; end on time
- ✓ Stay on topic/agenda
- ✓ Encourage ideas/feedback from all
- ✓ Achieve topic closure in a timely way
- ✓ Diplomatically manage behavior
- ✓ Model active listening

DIPLOMACY

- Non-threatening assertiveness
- Empathy
- Active listening

Am I a good Lions diplomat? How? Be specific:

What could I improve? Be specific:



WHEN:

- More information is needed on new idea or project
- A committee does not complete their report
- Program presentation includes a request for funding
- A decision is tabled for time management

HOW? DOCUMENT

- Name of project/event
- Action required
- Person responsible for action item
- Date required action item completion
- Facilitator contact log with responsible person

Discuss: What happens if there is no follow-up between meetings?

Meeting Follow Up Worksheet

Project	Action Required	Person(s) Responsible	Date Required	Contacted (✓)



- How was attendance? Why?
- Did I start and end on time?
- Were guests and potential members greeted warmly?
- Did I make it through the agenda?
- Did I engage the quieter members?
- Did I manage behavior in a diplomatic way?
- Did I use proper meeting procedures?
- Did I determine next steps and assign tasks?

RESOURCES:

[How Are Your Ratings?](#)

[Conduct the Survey ME15 –](#)

[Administrative Guide ME 15b](#)

[Club Quality Initiative](#)

[Member Satisfaction Guide ME-301](#)

[Lions Learning Center Meeting Management online course](#)

[The Art of Recognition](#)

**LCI Leadership Development Division
Lions Clubs International**

