

Ann Becker

AND ASSOCIATES, INC.

A GUIDE TO CONSTRUCTING EFFECTIVE MEETINGS

This Guide can be used whether the meeting you are planning is for 20 or 5000 participants. Should you have any questions about it, please contact Ann Becker at abecker@abecker.com.

- A. Strategy Considerations**
- B. Resource Management**
- C. Logistical Issues**
- D. Conducting the Meeting**
- E. Post-Meeting Tasks**

A. Strategy Considerations: Careful planning is the key to meeting success.

1. What is the overall goal/purpose of the meeting?
 - Is a meeting the best way to achieve your goal/purpose?
 - How will this meeting build on prior work, other meetings?
 - Are there unresolved problems that this meeting will address?
 - How will you assess the success of the meeting?
 - If future meetings are anticipated, when will you start planning?
2. What are the specific meeting objectives necessary to achieve the overall goal?
3. How will you reconcile the time available for the meeting with the time you need to accomplish your goals and objectives?
4. What is the timeline necessary to implement the meeting plan?
 - Is your meeting date flexible or is it tied to an external event or specific timetable?
5. In light of the meeting objectives, what are the major agenda items for the meeting?
 - What is the program design, including the group process of each agenda item?
 - What is the timing for each?
 - Do special documents or audiovisual presentations need to be prepared in advance?
6. Who is your target audience? How many people do you expect to attend?
 - Do you need to market the meeting to your target audience?
 - How will they benefit from attending?
 - How will you communicate in advance with your participants about the meeting, including expectations for participation?
7. How can you use up-to-date technology in planning, promoting, and managing your meeting?

Ann Becker and Associates, Inc., is a strategy consulting firm specializing in meetings, events, and organizational development for nonprofits, and can be reached at 773-955-0162 or abecker@abecker.com

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B. Resource Management: How much money and how many staff?

1. What is the financial budget for the meeting?
 - What are your goals?
 - How will you use the budget to strategically manage the planning process.
 - Which revenue strategies (for example, sponsorships or ads in program books) will you use?
2. Who will have responsibility for accomplishing the various tasks?
 - Whose skills are best suited to the scope of work?
 - Would it be a better use of resources to outsource some of the tasks?
 - How will the meeting's planners, particularly those responsible for program planning and logistics, efficiently and effectively communicate among themselves?

C. Logistical Considerations: Where are we meeting? Are we sleeping over?

1. What is the appropriate environment for the meeting?
 - What locations are best suited to the meeting ambience and budget--and also available?
2. Which sites offer the potential for an environmentally responsible or green meeting?
3. Does your meeting require overnight rooms and a variety of meeting spaces?
 - Do you have the necessary knowledge and experience to negotiate contracts that protect your interests in the face of unforeseen events?
4. Will food and beverages be served?
5. Is the site fully accessible?
6. Will the site accommodate participants' requests such as child care and dietary requirements?

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D. Conducting the Meeting: Where the agenda comes alive.

1. Who will have overall responsibility for running the meeting, from beginning to end—program, content and logistics?
2. Who will have roles in the meeting? Speakers? Facilitators? Moderators?
--How will they be prepped in advance?
--What facilitation techniques will they use to ensure participant involvement?
--Will they need audio-visual equipment?
3. How will the meeting highlights/results be documented and communicated?

E. Post-Meeting Tasks: Don't forget to learn from what happened.

1. How will you acknowledge the successes of your meeting with staff and volunteers?
2. How will the decisions made, evaluations, and post-meeting work be used?
--How will relevant outcomes be integrated into your organization's future?
--How will they inform the planning of any subsequent meetings?
--Where will the meeting's "history" be stored so it is a readily accessible resource.
3. What written communications (minutes, summaries, thank you's) will be sent after the meeting? To whom?
4. How will you follow up with participants who agreed to take on responsibilities identified during the meeting?