



# **Running Effective Meetings Webinar**

**October 22, 2015**

**iLead**

# Objectives

- Understand ways to create an effective and efficient meeting.
- Learn tips and best practices to make association meetings informative and engaging.

# How do you define:

- a successful meeting?
- a bad or unproductive meeting?

# Association Meetings....



- sets the tone and reputation of association.
- are a great recruiting tool.
- increase communication.
- Offer the opportunity to get to know each other.
- is an asset for your neighborhood.

# Meeting Basics

- Set specific day, time and location
- Advance planning
- Clear and concise purpose
- Agenda
- Minutes & Financial Reports

# Meeting Basics

- Managed and controlled
- Respectful & engaging atmosphere
- One hour to an hour and a half max
- Moves the association towards its annual goals.



# Planning Your Meeting

- Why are you meeting?
- What do you want to accomplish?
- How long does the meeting need to last to achieve the goal(s)?



# Planning- Agenda

- **Create an Agenda**

- Write it out.
- Produce it at your board meeting; ideally at least two weeks in advance.
- Outline what needs to be covered.
- Be realistic about what can be covered in the length of time for your meeting.



# Agenda Template

## **I. Opening/Welcome**

Introduce guests & new members

Housekeeping – bathrooms, meeting norms, turn off cell phones, etc.

## **II. Approval of Minutes**

Post the minutes at your sign in table

## **III. Approval of Treasurer's Report**

Post the at your sign in table

## **IV. Guest Speakers/Program**

Invite elected officials to speak first

## **V. Committee Reports**

Chair to report on status, decisions, etc.

## **VI. Unfinished Business**

(not “old” business)

Left over business from the last meeting

## **VII. New Business**

Lists topics

## **VIII. Closing/Adjournment**

Summarize actions taken

Summarize assignments made

Announce the next meeting date

# Agenda Tips

- Use a *working* agenda that has the time to help stay on track.
- Start creating the next agenda – tell members new business brought up from today’s meeting will be on the next meeting agenda.
- Post your agenda for all to see.
- **Follow** your agenda.

# Meeting Invitation & Promotion

- Keep it simple.
- Concise and easy to read.
- Tell members why they need to attend...what is in it for them?
- Send invitations out at least two weeks in advance.
- Use email, signs, social media, personal invitations.

# Planning –Set Up

## Location

- Convenient and accessible
- Enough Space
- Parking

## Room Set Up

- Registration table
- Table/chair set up to facilitate your agenda

# Planning – Set Up

- Sign in sheets – collect emails!
- Name Tags
- Refreshments
- AV Needs
- Social Time
- Meeting materials – agenda, minutes, financial report

# Meeting Time

## Start on Time!

- Demonstrates respect for members' and guest's time.



## Introduce the Board

- Make sure everyone knows who you are and the board.

# During the Meeting

- Follow the agenda.
- Use parliamentary procedure.
- Ensure everyone that wants to speak has the chance.
- Discussing a hot topic, try to have pro, con comments.



# During the Meeting

- Concern not on the agenda? - ask for volunteer to take the lead on the concern...if nobody steps up, park it or drop it.
- Use a comment sheet for issues and concerns.





# End of the Meeting

- End on time.
- Summarize decisions, actions and assignments made.
- Discuss items that came up that will be put on the next meeting agenda.
- Announce the next meeting date.

# After the Meeting

- Minutes need to be completed and published.
- Follow up on action items and assignments.
- Evaluate the meeting with the board...need to make any changes?
- Give recognition and appreciation in writing.



# Meeting Minutes

- Critical to the operation of your association.
- Record of actions, assignments, outcomes and successes.
- Historical record.
- Provides continuity and information for succeeding committees and board members.

# Taking Minutes

- Record of motions, actions and decisions made during the meeting. – not discussions.
- List date, time, location and type of meeting.
- Outline meeting opened by whom and the start time.



# Taking Minutes

- Note if a quorum of membership is present.
- Note approval of past meeting minutes and the current financial report.
- Note who presented and key points of committee reports.
- Record assigned action items.

# Managing Meeting Time

- Person bringing up the idea, will they take the lead on the resolution or implementation?  
No...drop it!
- Don't finish any discussion without deciding how to act on it.

# Parking Lot?

- A place to put ideas, suggestions, issues, are brought up at meetings, not on the agenda, or not enough time to discuss.
- Parking lot can be a note pad or a flip chart.

**It is important that the member that brought up the idea needs to know it has been written down for future consideration.**

# Assign Action Items

- Don't finish any discussion without deciding how to act on it.
- Assign someone to an action item before moving to the next item, helps with follow through.
- Summarize actions and assignments clearly and concisely.



# Evaluate Your Meetings

- Periodically evaluate meeting format and structure
- Does the meeting help to achieve your association's mission and goals.
- Ask for feedback from your board and members.
- What is working and what could be enhanced?



**For more information, download the iLead  
guide:**

**Effective Meetings at  
[cityoforlando.net/ocnr/ilead/guides/](http://cityoforlando.net/ocnr/ilead/guides/)**

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