

Unit 311 Plan, organise and support meetings

Unit summary

Plan and prepare meetings; support meetings and undertake follow-up activities.

Skills

You will apply the following skills:

- Negotiating
- Planning
- Organising
- Communicating
- Checking
- Interpersonal skills
- Problem solving
- Writing
- Managing time
- Managing resources
- Evaluating

Performance indicators

You will:

Prepare for the meeting

1. Plan and agree the meeting brief
2. Organise and confirm the venue, equipment and catering requirements
3. Prepare and agree an agenda and meeting papers
4. Invite attendees and confirm attendance
5. Make sure attendees' needs are met
6. Collate and dispatch papers for the meeting within agreed timescales
7. Make sure the chair receives a necessary briefing
8. Produce spare copies of meeting papers
9. Arrange the equipment and layout of the room

At the meeting

10. Make sure attendees have a full set of papers

11. Take accurate notes of the meeting, including attendance
12. Provide information, advice and support when required

After the meeting

13. Produce a record of the meeting
14. Seek approval and amend the meeting record as necessary
15. Circulate the meeting record to agreed timescales
16. Respond to requests for amendments and re-circulate amended copies
17. Follow up action points
18. Evaluate and maintain a record of external services

Knowledge

You will know:

1. The role of the person organising and supporting the meeting
2. How to plan and support meetings effectively and efficiently
3. The types of meetings and their main features
4. Why it is important to plan and agree a brief for the meeting
5. The main points that should be covered by an agenda and meeting papers
6. The types of information that attendees will need
7. How to identify suitable venues for different types of meetings
8. The types of resources that will be needed for different types of meetings
9. Any special requirements that attendees may have and how to meet them
10. Health, safety and security requirements when organising meetings
11. Why it is important to brief the chair in advance of the meeting
12. The types of information and advice and support you may be asked to provide during meetings
13. The types of problems that may occur during meetings and how to solve these
14. What should be included in a record of the meeting
15. Why it is important that you make sure the record is accurate and is approved
16. How to record and follow up actions
17. How to evaluate external services

Evidence Requirements

This section is aimed at the assessor and sets out the evidence requirements for this unit.

1. Evidence for this unit is generated when your candidate is carrying out real work in a private sector organisation, not-for-profit organisation or public service organisation whether full-time or part-time, paid or voluntary.
2. A Realistic Working Environment or Simulation is not allowed for this unit.
3. Evidence must show that your candidate has consistently met the standard over a sufficient period of time for you to consider the candidate competent.
4. You may use the following assessment methods when assessing this unit:

Performance evidence	Observation	Yes
	Examination of work products	Yes
Supplementary evidence	Witness testimony	Yes
	Questions *	Yes

* This includes verbal and written questioning, questionnaires, work based tasks, reflective accounts, case studies, professional discussion and feedback reports.

5. Your candidate needs to show that they:

Prepare for the meeting. Evidence may include:

- Planning records
- Venue searches
- Seating plans
- Resources for the meeting including catering requirements
- Meeting briefs
- Confirmation emails - venue, equipment, catering
- Booking forms
- Location maps
- To do lists
- Minutes of previous meetings
- Agendas
- Invitation letters/emails
- Chair's agendas
- Chair's papers
- Confirmation of attendees
- Delegate lists
- Meeting papers
- Copies of purchase orders or invoices
- Equipment lists

- Special requirement requests

During the meeting. Evidence may include:

- Room preparation records
- Resources
- Meeting papers
- Meeting notes
- Sign-in sheets
- Claim forms
- Feedback forms

After the meeting. Evidence may include:-

- Draft minutes
- Records of communications with chair
- Final/amended minutes – chair’s approval
- Action plans
- Circulation lists
- E-mails/letters sending minutes and follow up papers to delegates
- Evaluation forms from delegates
- Evaluation of external services and suppliers

6. Contingencies

Performance Indicator 12	If no information, advice or support is required during the assessment period professional discussion or dedicated tasks may be used to confirm competence
Performance Indicator 16	If no amendments are necessary during the assessment period professional discussion or dedicated tasks may be used to confirm competence

7. Evidence generated for this unit may contribute towards Unit 301:

- Communicate information
- Plan and be accountable for your work
- Improve your own performance
- Behave in a way that supports effective working

and Unit 302

- Work to achieve your organisation’s purpose and values
- Support sustainability
- Support diversity
- Maintain security and confidentiality

- Assess and manage risk