

Organise and run meetings

Overview

This standard is about organising and running meetings. These can be face-to-face or conducted remotely using appropriate technology. You will be responsible for planning meetings and agendas. It involves organising the venue and ensuring meeting invites are sent out to attendees. For remote meeting you will need to test the software in advance to ensure all attendees have access to it and all functions are working. You will prepare for the meeting, take minutes, agree these with relevant members of staff and ensure that follow-up actions are clearly identified. It also involves producing records of discussions, decisions taken during meetings.

It is for professionals in business administration roles who are responsible for organising and running meetings.

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Performance criteria

You must be able to:

Before the meeting

1. plan and agree the meeting brief
2. agree agenda items, time required for each item and meeting papers required
3. prepare the agenda including matters arising and action points from the last meeting
4. finalise agenda and the meeting papers
5. set day, time and location of the meeting
6. send out the agenda and all accompanying materials, where required
7. invite attendees, confirm attendance and identify any special requirements
8. organise and confirm venue, equipment and catering requirements, ensuring meeting facilities are in accordance with requirements
9. check equipment and layout of room meets meeting brief
10. test the software required for the meeting remotely
11. make sure someone has been nominated to take minutes, if required

During the meeting

12. greet people attending the meeting
13. ensure all attendees have the papers and other resources they need
14. take notes at the meeting of all those aspects required by the organisation and, where appropriate, by law
15. start meeting on time
16. provide advice and support information, run presentation materials

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17. allow opportunities for attendees to contribute
18. manage individual agenda items to ensure meeting duration is adhered to
19. summarise discussions and agree actions, where required
20. observe formal voting and approval procedures, if appropriate
21. agree date, time, location and mode of the next meeting
22. close the meeting on time

After the meeting

23. clear and vacate the meeting venue according to requirements
24. maintain a record of external services, where these have been used
25. approve meeting records and list of actions
26. produce accurate minutes that record the meaning of discussions and the decisions taken
27. agree the minutes with relevant members of staff and circulate within specified timescales
28. ensure minutes are in agreed format
29. collect and evaluate participant feedback from the meeting and share the results with relevant members of staff
30. ensure follow-up actions and responsible attendees have been clearly identified
31. reflect on whether the meeting met its purpose and agree learning points to improve the running of future meetings
32. ensure the process for signing off minutes and action points has been agreed
33. keep track of agreed actions, record their progress and completion
34. observe all requirements for confidentiality and sensitivity in line with organisational policy

35. store the minutes securely in accordance with following organisational procedures

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Knowledge and understanding

You need to know and understand:

1. the different types of meetings, their main purposes and objectives
2. how to plan meetings to meet agreed aims and objectives
3. the purpose of agreeing agenda items and allocating times for agenda items
4. the types of information attendees require
5. the purpose and benefits of minutes as an accurate record of discussions and decisions
6. the documents that are commonly used in meetings: agendas, minutes, matters arising, action sheets and etc
7. how to identify suitable venues or software for different types of meetings
8. the types of information that attendees will need
9. the types of resources, including technology, needed for different types of meetings
10. why it is important to test the software before the meeting
11. the health, safety and security requirements when organising meetings
12. any special requirements that attendees may have and how to meet them
13. the main points that should be covered by an agenda and meeting papers
14. the types of information, advice and support that may be asked to be provided during meetings
15. the purpose of approving records of previous meetings, if applicable
16. how to facilitate discussions so that the purpose of each agenda item is achieved
17. how to take notes during discussions
18. how to sort, select and structure information to produce minutes
19. how to summarise discussions and agree actions at appropriate points
20. the types of problems, including conflict, that may occur during meetings and how to resolve them
21. how to record and follow up actions
22. how to evaluate external services
23. the organisational procedures for clearing and vacating a meeting room
24. the different ways to collect and evaluate participant feedback from the meeting
25. how to agree learning points to improve the organisation of future meetings

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Skills

1. communicating
2. checking
3. decision making
4. evaluating
5. interpersonal skills
6. facilitating
7. organising
8. leading
9. managing resources
10. managing time
11. planning
12. problem-solving
13. summarising

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Developed by	Skills CFA
Version Number	1
Date Approved	08 Feb 2021
Indicative Review Date	01 Mar 2026
Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	CFABAA411, CFABAA412, CFABAA413, CFABA441
Relevant Occupations	Administration, Administration and Secretarial Occupations, Business, Business and Related Associate Professionals, Administration and Law
Suite	Business and Administration
Keywords	Business; administration; meetings