

Preparing for Meetings

Researched and written by Rachel Gibson

Meetings are an essential – sometimes enjoyable, sometimes tedious – part of getting any idea or project off the ground. There are many kinds of meeting, from the large and formal to the small and impromptu. This page aims to provide some pointers to making best use of meeting time and looks at how to prepare for a number of different meeting scenarios.

General Points

At their best meetings are highly effective forms of communication as they involve face-to-face contact with a group of people who are clear about why they have come together and what they want to achieve. Meetings provide opportunities to:

- Put names to faces if it is a meeting with people that you have not met before
- Exchange information, particularly relatively complex information that may require explanation or illustration in ways that would be difficult if done at a distance
- Discuss issues and ideas.

Whilst meetings are undoubtedly useful, to be fully effective they require time and commitment from all those involved. For large formal meetings an agenda and other documentation may have to be prepared and circulated far enough in advance for all those attending to have time to read and prepare. Even if formal documentation is not appropriate, any meeting requires those involved to spend time in advance thinking about the issues and ideas that they wish to discuss and the best format for the meeting.

Before going down the path of organising a meeting it is important to establish whether it is actually necessary to hold a meeting or whether what you want to find out or share could be done in other ways.

Checklist

Is my meeting necessary?

How many people do I need to involve?	<ul style="list-style-type: none">• If you need to communicate with no more than one other person then perhaps a phone call or exchange of e-mails would be as effective as a meeting• If two or more people are involved then a meeting may be best
Is information exchange the only thing I wish to do?	<ul style="list-style-type: none">• If it is, how complex is the information I wish to exchange?• If it is fairly simple, could I communicate it without a meeting? <p>If it is relatively complex, or needs communicating to a significant number of people then a meeting is probably best.</p>
Are there ideas and issues I wish to discuss?	<p>If dialogue and discussion are critical to moving your plans forward then a meeting with those with whom you wish to discuss things is likely to be essential</p>
Would a face-to-face meeting help to initiate or consolidate an important relationship?	<p>If it would, particularly if you have been communicating with the individual(s) in question via phone, letter, e-mail etc. for some time, then a face to face meeting could be the only way to consolidate the relationship.</p>

What this checklist aims to highlight is that meetings should be arranged and used sparingly. If you think clearly about what you need to communicate and with whom, then it may be that there are instances where what you need can be achieved with a phone call or two rather than a meeting.

Different types of meeting and how to prepare for them

This page sets out some typical meeting scenarios with checklists of what to think about and prepare in advance. We have aimed to include a variety of meeting types from the formal to the informal and from those which you might initiate to others in which your role has been more responsive.

1 Meeting with a prospective funder

Scenario

You have requested a meeting with a representative of a funding body to discuss whether a project you are planning meets the funder's criteria. If it is likely to be eligible you would like to find out as much as you can about how best to present a written application.

Preparing for the meeting

Many funding bodies now have comprehensive websites which set out funding criteria and give detailed guidance on how to complete an application form. Before telephoning you should ensure that you have read and understood all available information and that there are additional details that you can only clarify through direct contact with a funding officer.

Before telephoning to arrange a meeting, have your queries and points of clarification set out clearly. It may be that you can talk to an officer over the phone and that a meeting will not be necessary.

However, if you are applying for funding for the first time, or if you are otherwise unclear about the application process, press for as much help as you think you need in order to do yourself justice. If you are working in ways which appear to you to fall between funding categories, then a face-to-face discussion with a funding officer is probably the best way to resolve any lack of clarity.

If you do get to the point of having a meeting then you should prepare in the following way:

- Ensure that you have made contact early enough to give yourself time to meet deadlines
- Be clear about what you want to do. Take a short written description of your project with you (or send one in advance) and arrive prepared to talk enthusiastically about your ideas. Funding officers understand that you may not yet be at a stage where all the details are in place, but do be prepared to talk as clearly as you can about the broad concepts
- Don't give the impression that you will change your ideas in order to meet funding criteria. This does not work. A funding officer will make suggestions as to how you can present the ideas in the light of funding criteria, but will not be impressed if you imply that the project is infinitely variable – at the end of the day the funder wants to know what *you* want to do
- Read all the funding criteria in advance and bring with you a list of your specific questions or points of clarification

- Think about things that may not be mentioned in the criteria but which it could be useful for you to know. For example:
 - Even if a maximum application amount is published in the criteria, it may be that for a project of the scale you are proposing the maximum level is unrealistically high from the funder's perspective. Ask the funding officer's view on the maximum amount for which they think you should be applying
 - What is the overall budget for the fund in question and how many awards are likely to be made? (There may not be a simple answer to this question so don't be offended if the officer is unable to give you a clear reply)

2 Project planning meeting

Scenario

You are initiating a piece of work with a number of collaborators and wish to discuss ideas and plans with key members of the project team.

Preparing for the meeting

As the initiator of the project, and of this particular meeting, making the arrangements is your responsibility. You must find a time when all those who are needed are available (or at least the vast majority of them are). You need to arrange a space to meet which is relatively easy for everyone to get to and which is private and quiet enough for discussions to take place with ease. Try to ensure that you are meeting somewhere where it is possible to provide or buy drinks.

A meeting of this kind is usually held at a relatively early stage in the evolution of a project and is intended as a way of developing artistic ideas and beginning to look at practical arrangements. You are unlikely to have extensive documentation at this stage, but in order to get the best out of the meeting it is advisable to prepare and circulate the following papers in advance:

- A brief outline of your main ideas for the project – this may be no more than one side of A4 and in note form, but it will help to ensure that people come to the meeting with some common knowledge and have the opportunity to think about your ideas before they arrive
- Short biographies of all those attending and their role in the project. This is particularly useful if some or all of the collaborators have not met before. It may be less essential if you are a group of long-standing colleagues

- An agenda – this provides a structure for the meeting and provides everyone with a clear ideas of what is to be discussed and achieved during the meeting. A typical agenda for a meeting of this kind might look like this:

Meeting to discuss the development of Hibiscus project	
To be held on 19 August 2003	
From 4pm to 6pm	
At 4 Neptune Way, London SE11 2XY	
Those attending:	
Helen Simpson	Choreographer and Project Director
Alan Mulder	Dancer
Edna Scully	Dancer
Maureen Kirk	Designer
Lucy Clifford	Composer
Agenda	
<ol style="list-style-type: none"> 1. Project update 2. Group discussion of main themes and concepts from the creative perspectives of each team member 3. Discussion of schedule for workshopping during research and development phase 4. Practical issues 5. Summary of action points 6. Any other business 	

On the day of the meeting:

- make sure that you arrive at the meeting venue a little early
- make sure that there are enough seats for everyone and that these are arranged so that everyone can see and hear each other.
- bring spare copies of the paperwork in case any advance mailings have gone astray, or people have left their papers behind
- be prepared to introduce the meeting by running through the agenda and highlighting the issues to be discussed
- Either be prepared to take notes yourself, ask one of the other participants to take notes or bring someone else along to note-take. For a meeting of this kind you will not need to produce formal minutes, but you will need to make a note of all the significant points that were agreed and any action that will be taken and who will take it.

3 **Attending a conference or other public or open meeting**

Scenario

You have been invited to attend open meetings, seminars or conferences where broad issues of interest to those in the dance, arts or other sector are to be discussed. Gatherings of this kind can be very useful as a way of making or consolidating contacts, for finding out what funders, politicians or other opinion-formers are thinking about the arts or stimulating your own thoughts and ideas about a particular issue.

Preparing for the meeting

For a meeting of this kind you will usually be sent details of the practical arrangements, order of events and keynote speakers, etc. in advance. Make sure that you RSVP if necessary as places at events of this kind can be limited.

Make sure that you read and think about any paperwork in advance. To get the best out of a meeting like this it helps to:

- Have understood and spent some time thinking about the issues to be discussed
- If there are to be breakout discussion groups during the day, be clear which you would be most interested in being a part of
- Think about any specific points you would like to make during the event and when it might be most appropriate to try and raise them. Large gatherings like this can be rather intimidating, so have a form of words ready in your head. It is probably best not to bring “ready prepared speeches” with you as what you want to say may change as a result of the contributions of others during the day.
- If you are nervous about speaking in public then events like this can be good practice. Perhaps you can set yourself a target of ensuring that you make at least one contribution to discussions and congratulate yourself if you manage to do it. On the other hand, if the moment passes, or if someone else jumps up and makes the exact point you were about to make, don’t chastise yourself, just try again next time
- It is often said, and with some truth, that the informal conversations that take place between sessions at public events of this kind are more useful than the sessions themselves. If you are investing a whole or half day of your time in attending something of this kind then to make the most of it you should use the breaks as an opportunity to catch up with old contacts, perhaps bump into new ones and put names to faces.

4 Bumping into an important contact

Scenario

You are at a performance and realise that a promoter who you are very keen to interest in your work is also there. You would like to speak to them, but are nervous about approaching them “cold”.

Seizing the opportunity

Situations like this are not always easy to handle, unless you are supremely confident. On the one hand you do not want to miss the opportunity of making an important contact, on the other you do not want to blow it and run the risk of coming across as a complete idiot. It is important to remember that in a situation like this the most it is appropriate to do is raise awareness of your work with the promoter in question. They are not going to offer you a booking on the spot or even promise to come and see your next show. What you can hope to do is break the ice and leave a little information about who you are and what you do so that the next time you come into contact with them your rapport is a little more developed.

It helps to ensure that you always leave home well-prepared for a potential encounter of this kind. Get into the habit of carrying with you information on your current work, or if you are a manager, the work of the companies and artists you are currently managing. Have an opening line in your head – exactly what form this takes will depend upon you and what you feel comfortable with. Nine times out of ten you will probably not find yourself in a situation where you need to act on this preparation – but if you are mentally prepared and have material with you, you are well placed to seize an opportunity if it arises.

Assuming that the promoter in question is someone that you have never met before:

- Watch them for a moment and see if there is any sign that you share a mutual acquaintance who might be able to introduce you. It is sometimes easier to break the ice with an introduction rather than just grab someone
- Watch too to see if there is likely to be a chance for you to get a word in edgeways. If they are deep in conversation with someone else or obviously doing some networking of their own then it might not be the best time to try and grab them
- Do any watching subtly and from a distance, don't hover around at their elbow
- If you spot an opportunity, walk up calmly and introduce yourself. Ask if you can tell them a little bit about your project. If they are clearly not interested then don't pursue it, but it is unlikely that they will completely blank you. Ask them some questions about their

venue/festival, etc. – if it is a mixed programme venue, how much dance do they promote, what is their space like and how do they feel dance looks in it?

- Don't prolong the conversation for longer than feels comfortable. Leave a leaflet or postcard with them, thank them and say that you will be in touch again
- Don't launch into a lengthy or pushy description of your work – it is probably counter-productive to pin them to the wall for the whole interval.

Further thoughts

Listening, understanding and learning

The better you are at listening, understanding and learning, the more effective you will be in meetings. Meetings become unproductive if there are people present who are unwilling to listen to, think about and understand the views of the other people present. It may help you to develop a personal protocol for meetings. For example:

- Listen carefully to what others say
- Try to understand what motivates others to express particular opinions or ideas
- Treat the ideas of others with respect
- If you disagree with something someone has said, say so, but calmly and politely
- Express your own views succinctly and clearly
- Be prepared to change your views on an issue if you are persuaded by the debate
- If it becomes clear that the meeting has reached an impasse, either because more information is needed in order to progress things or because people have become entrenched in a particular argument, be prepared to diffuse the situation by suggesting that the group reconvenes at a future date
- Don't lose your temper
- Remain calm if others lose their temper

Board meetings

If you reach a stage where you are operating as a limited company or other legal entity then you will be obliged to convene a board of directors who will need to meet regularly to fulfil their legal remit. More information on how to set up and run structures of this kind can be found in *Care, Diligence and Skill: a handbook for trustees of arts organisations*, 5th edition. This is published by the Scottish Arts Council and can be ordered online (cost £5) <http://www.scottisharts.org.uk>

Think about the needs of those attending meetings

If you are involved in arranging a meeting of a large group of people then it is possible that some of those attending might be disabled. It is important to ensure that all those attending can actively participate and you may need to make arrangements to ensure that specific practical needs are met.

The Disability Discrimination Act places a legal obligation on all those offering goods or services to ensure that these are accessible to disabled and deaf people and detailed information can be found on:

<http://www.disability.gov.uk>

<http://www.drc-gb.org> – Disability Rights Commission

Here is a basic checklist for ensuring that all those attending a meeting can fully participate:

- Make sure that any information you send out in advance includes a reply slip on which people can register any special needs
- Make sure that any written information sent in advance or handed out at the meeting is also available in large print and audio formats
- Make sure that the venue you select is fully accessible for wheelchair users and others with limited mobility
- Make sure that there is adequate designated parking for disabled people
- If you are using visual material as part of a presentation, make sure that you use it in a way that is meaningful to those with visual impairments
- Budget for and book sign language interpreters if you are expecting deaf participants. Sign Language interpreters can be scarce, so book well in advance. British Sign Language (BSL) is most often used, though not always, so it is best to check.
- Arrange the room a way that ensures all those attending can see and hear one another and reserve seats at the front for anyone who needs to be close to OHP screens, sign language interpreters, etc.

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