

GUIDEBOOK

Chapter Leadership Training

Programs and Meetings Guide



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CHAPTER LEADERSHIP TRAINING

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Introduction

Almost from the time we start school, we are involved in chapters or chapter-like activities. By the time we reach adulthood, we have been exposed to a wide array of chapters and/or chapter-like organized activities.

The largest concern with parliamentary procedures controls as a means of maintaining decorum is that it carries forward so that one meeting becomes the prototype for the next, and another, and so forth. With such a stereotyped format, it is little wonder that members squirm and shuffle waiting for the speaker to start. They know exactly what is coming next and can't wait to get beyond.

Of the activities engaged in by NMA chapters, the monthly meeting is the only truly universal function. Traditionally, the monthly dinner meeting has been the central and sometimes the only chapter activity. While considerable progress has been made down through the years, no other program or activity has seriously challenged the pre-eminence of the monthly meeting--at least in the minds of the members.

With so much historical and current emphasis on the monthly meeting, it is imperative that we provide the best programs possible. This involves planning and administration, the meeting content, and the staging of the meeting. Obviously, these phases are not mutually exclusive; thus sometimes there are areas of considerable overlap.

What do you suppose would happen if the meetings didn't follow the usual procedure? One thing for sure is that the members would notice it immediately. Why not dare to be different? Give the members something to stay alert for...and a reason to come back to the next meeting.

You may experiment with all parts of your meetings and programs. For starters, you might change the order of procedure of the meeting. There is nothing that says you must socialize first, then eat, have announcements, and then a featured speaker. Try it the other way around. The social hour could even be eliminated. You could replace it with an ice-cream sundae bar after dinner. Many chapters are finding out that meal costs are exorbitant; therefore, they plan more non-meal meetings

The main thing is to exercise ingenuity. This guide is designed to start you thinking and planning for more interesting meetings.

Planning & Administration

PROGRAMS/MEETINGS TEAM ORGANIZATION

Monthly programming is considered so important by many presidents that they take personal responsibility for this function. Obviously, one person would be hard pressed to handle all of the details, so usually the president appoints a program coordinator (or program chairman) as a staff position reporting directly to him/her. In this way, the president can keep close to the programming function through an expert whose sole responsibility is to keep tabs on the monthly meeting.

A well-organized president might have the Program Chairman with four or more team leaders reporting directly to him/her. They, in turn, may be in charge of various functions. Each team leader would have as many members on the team as necessary to carry out the work.

FUNCTION OF PROGRAMS/MEETINGS TEAM

What is the function of a Program/Meetings Team? This varies somewhat from chapter to chapter, but essentially, there would be teams dealing with program content, reception, promotion and publicity, registration, and arrangements--each headed by a team leader. These teams could be further broken down into main features, spotlight features, entertainment, new ideas, audio-visual, fellowship features, special arrangements, and so forth.

This type of organization distributes the workload proportionately and makes the jobs more manageable for everyone. It also has the added advantages of: (1) providing active participation for many members (definitely a characteristic of an outstanding chapter) and (2) providing excellent managing experience.

No matter how your entire team is organized, it is a complex function that requires the services of many people for successful operation. Following is an example of how responsibilities of a program team may be distributed.

All Program Team Leaders

- Attend all scheduled meetings of the program team
- Select additional team members when necessary
- Establish meeting dates for team
- Distribute duties to team
- Assign duties to each team member
- Keep records of all team activities
- Develop and maintain a schedule of due dates for team responsibilities

Program Chairman (Coordinator)

- Correlates the overall program by keeping in constant contact with all team leaders
- Arranges for and conducts meetings with team leaders on a regularly scheduled basis
- Maintains a record of all teams and reports to council or chapter

Program Content Team

- Selects theme
- Outline programs
- Secures featured speakers
- Prepares meeting programs
- Obtains necessary biographical sketches and photographs
- Secures awards when required
- Secures person to introduce featured speaker
- Secures "official" welcome speaker, i.e. city, NMA, etc.
- Secures invocation leaders
- Furnishes arrangements team with A/V equipment and facility needs of program personnel
- Checks size and acoustics of each meeting room to determine need for a public address system
- Provides background music and light entertainment for pre-program
- Plans and arranges for any special entertainment
- Sends necessary copies of correspondence, programs and instructions to all program personnel (including follow-up confirmation with the speaker).
- Designs and administers evaluation records
- Prepares and sends thank-you letters to all program personnel

Promotion and Publicity Team

- Determine calendar program for publication of promotion literature, programs, registration blanks, and other materials, coordinating calls by member relations people
- Arrange for adequate publicity via newspapers, company and chapter publications, mail, e-mail, home page, and/or radio and television
- Arrange for printing of programs in cooperation with program content team

Registration Team

- Arrange for meeting to, (a) learn what help and equipment is available for registration desk (b) estimate amount of help and when needed
- Arrange for necessary tables and other equipment required to conduct registrations
- Takes full charge of registration desk—handles new registrations and answers all questions
- Prints registration blanks and badges
- Handles all advanced registrations
- Prepares name badges
- Distributes badges and programs

Arrangements Team

- Become thoroughly familiar with facilities being used
- Orders all signs needed by various teams and puts up at proper places
- Checks all equipment needed
- Arranges for, (a) public address system, (b) proper lighting, heating, and ventilation, (c) proper number of chairs, (d) gavel, water, flag, etc., (e) material for each speaker, (pads, pencils, blackboard, eraser, chalk, etc.)
- Secures place cards for speaker table
- Makes sure a flag is in the room

WHO REPORTS TO WHOM?

No matter how small or uncomplicated the team may seem, for maximum efficiency it is necessary to have the relationships between the various functions spelled out. This can be done with an organizational chart. This way it will be clear as to who reports to whom.

As a further step in an orderly organization, it is desirable to draw up job descriptions for each member of the team. These should be in sufficient detail that there is no confusion over duties and responsibilities.

While the program team is basically responsible for putting on the monthly meeting, there are several other teams that are deeply involved in the total picture. Publicity, member relations, and professional development all play vital roles in the success of a meeting. This means there is a lot of contact between the program team and other groups in the chapter. Sometimes, friction can occur or communications can break down. At times, it can be difficult to get the discrepancy resolved. In chapters that have a presidential program coordinator or chairman, things can be resolved easily because he/she is able to cut across organizational lines where programming is concerned.

CHOOSING A THEME

Chapter programming—as with any other management undertaking—must have a goal if it is to be successful. The programming goal, of course, must be a part of the overall chapter objective. This means that the master plan or objectives will be set by your policy-making body, usually the Board of Directors. Sometimes, though, the Board may be lax in fulfilling this duty. What does the Program Chairman do then? He/she can't wait very long, so if nothing is forthcoming he/she must take the initiative and set a theme—the first step toward an inspiring chapter program.

Once the theme is set, it is necessary for the Program Chairman (usually in consultation with other chapter officers) to translate the overall theme into sub-themes for each monthly program. It is only after these two steps have been taken that the process of securing speakers and program features begin.

PROGRAM PLANNING

ADVANCE PLANNING

Please note that not all program scheduling should take place after a program chairman or coordinator is appointed. Many attractions must be booked and many facilities reserved more than a year in advance. This means that an incoming program chairman may inherit some program dates from predecessors. If so, you must treat these as fixed dates.

More importantly, however, is the need to have a process in place for the long-range planning of programs. This might take the form of the program coordinator working with the Long-Range Planning Committee. This should be a continuous group with rotating membership; i.e., membership for two years or more with the terms of office on a staggered basis. This will ensure continuity in experience and planning.

NMA Monthly Program/Meeting Planning Chart *(copy on next 2 pages)*

Commit all thoughts and arrangements to writing. This starts with the NMA Monthly Program/Meeting Planning Chart. This is the basic tool for recording, organizing, and monitoring your monthly meeting plans. As the various spaces begin to get filled and additional space is necessary, it is time to start a more detailed record.

First, fill in fixed dates; i.e., chapter election meeting, installation meeting, Holiday event, as well as program dates you may have inherited from the past year's administration.

Next fill in traditional programs, such as Top Management Night, family picnic, NMA Leadership Speech Contest Night, etc. Lastly, block in subjects for the remaining months.

In addition, the NMA Monthly Program/Meeting Planning Chart is a useful tool in coordinating the efforts of various teams. There are columns to record specific actions to be taken. As the actions are completed, they can be checked off the list.

NMA MONTHLY PROGRAM /

Month/Day/Year	Program Feature	Advance Preparation	Spotlight Feature
January			
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			

Develop Agenda

When the subject matter for each month is set and the featured speaker or activity is selected, then it is time to start filling in the remaining columns of the chart towards the goal of developing a tight agenda for each month.

After the agenda has been roughed in and refined, it should be reproduced and distributed to all team members, as well as, members of the publicity team, boosters and others responsible for making the meeting a success. This gives them the necessary information to properly carry out their duties.

Also, it is a nice touch to reproduce the agenda (without the timing, of course) for distribution to each place setting at the meeting.

The ultimate purpose of the agenda is to use it as a means of keeping the meeting running on schedule. Here the timing is of utmost importance in keeping the meeting running smoothly and efficiently.

Publicize Meeting

No program can hope to be successful if people don't know about it. While the mechanics of notifying members usually are not in the realm of the Program Committee, it is a natural thing that the program people should be concerned about this phase of the operation and exert influence to obtain the best results.

An often overlooked facet in the success of chapter programming is the role of executive management. Management can be of great help in suggesting goals, meeting subjects, and obtaining speakers. Also, management just plain likes to know what is going on and likes having a part in the chapter activities. Active top management will have a profound influence on all participation in chapter affairs. It is important to invite and encourage the attendance of the whole top management team.

Here are a few suggestions on how you can publicize your meeting.

- Distribute flyers to all members and potential members.
- Advertise on your home page. You might even consider having an online registration form to make it easy for people to register.
- Advertise your meeting in your chapter's monthly newsletter.
- Place a poster or flyer on your company bulletin board.
- Advertise on your local PBS television station.
- Send an e-mail to all members, as a follow-up reminder.
- Be sure to announce next month's meeting at the current meeting.

BUDGETING

Lump Sum

The most common (but not necessarily the best) way programs are financed is through Board action where a lump sum is allocated for the year. The amount of this allocation is usually based on one of the following.

1. Previous expenditures for programming
2. Picking an arbitrary figure
3. A percentage of the anticipated chapter income

This is convenient, but usually isn't compatible with the chapter's objectives or goals, and can lead a chapter down the primrose path.

Yearly Allowance

A more realistic approach is the program coordinator's request for a year's allocation based on an estimate of the cost of each program for the year. Here he/she must provide at least a tentative program schedule and put a price tag on it.

Monthly Budget Request

A refinement of this is to make a scheduled and estimated yearly cost. Also, each month you should submit detailed figures of the actual expenditures for the past month as well as draw up a detailed budget request for the subsequent month. This way, the Board receives quite accurate figures upon which to act each month.

Season Tickets

An interesting sidelight to budgeting is a plan to sell season tickets to the meetings. This is calculated to improve participation in chapter meeting and, at the same time, somewhat stabilize the financial risk to the chapter. The season ticket would allow the holder to attend all meetings at a cost somewhat less than the total price of the individual meetings.

Setting the Content

Most meetings have three parts, aside from any eating or social functions that might occur. These three functions are: Opening Ceremonies, Spotlight Feature, and the Main Feature. Each plays a distinct and important part in making the meeting a success.

- Opening Ceremonies - These usually consist of an invocation or words of inspiration and the salute to the flag. While not required, provision for these ceremonies is written into many chapter constitutions. The remainder of the chapters includes these in their monthly meetings as part of NMA tradition. Details on opening ceremonies and how to dramatically stage the ceremonies is covered later in this booklet.
- Spotlight Feature - This is a short, but tightly drawn, feature designed to complement the other evening features.
- Main Feature - The highlight of the evening that occupies the major part of the meeting agenda.

OPENING CEREMONIES

Call to Order

Most meetings are called to order by means of the chairman rapping a gavel. The call to order can be made dramatic, thus achieving the attention getting situation that is desired. There are various ways to begin your program.

Invocation

An invocation or spiritual message is the standard start for most meetings. Since the NMA is by charter non-sectarian, there is no reason why we should be limited in our choice of invocations to our predominant cultural background. There are many cultures throughout the world—both primitive and modern—that offer outstanding opportunities to lift this part of the meeting to new heights of inspiration and member interest. Many times you may select someone from the audience to give the invocation.

Out of respect for different religious beliefs, we recommend that any invocation be non-denominational. NMA has available a non-denominational invocation booklet, at no charge.

Singer

From among the members and their families you're sure to find someone with a good voice who can sing the National Anthem or some inspirational song. Dramatize the performance by turning out all the house lights and putting a bright spotlight on the singer. Word of caution: Be sure the piped-in background music is turned off before the singer starts.

Flag Salute

First, be sure you have the appropriate flag(s) available (U.S., state, corporate, and/or the flag of any international guests). Unfortunately, this one oversight has caused embarrassment for many chapters, at one time or another. After being assured of a flag(s), the remainder of the salute is a fairly static affair that often leads to incoherent mumbling. This lack of action in the flag salute can be made up for a number of ways.

Spotlight

Turn out all house lights and turn a bright spotlight on the flag

Military Color Guard

Color guards and drill teams from veterans' organizations, reserve units, and ROTC are usually available to add drama and impact to the patriotic start of a program. Don't forget the possibility of the high school Junior ROTC Color Guard.

Chorus

Singing the "Star Spangled Banner," "God Bless America," or "America the Beautiful" is an appropriate way to start a meeting—keeping in mind that if you have international guests, additional protocol will need to be considered. For a variation, the audience can be brought in to sing the second chorus. Caution: Do not use singing in place of the flag salute, if a singing invocation has been used.

Table Games

Most dinner meetings have an awkward period between the time when most people are finished and all the tables are cleared, and readied for the featured portion of the meeting. This is the time when members start to wander around, strike up conversations, stroll out to the bar, and generally add to the confusion. So, this is an excellent time to introduce table games to hold their interest until the feature portion of the meeting is ready to start. Games can be used also as the spotlight feature. Whether of a professional topic or otherwise, the games must be fun, simple to explain and understand, and the game leader must have a strong personality, with a voice to match, in order to keep the audience's attention.

Mixer

You may want to use a mixer designed to get people to meet other people. For instance, you could have everyone stand up, turn around, and shake hands and introduce him/herself to someone they've never met. This is a good way to get started, especially if you have several guests present.

SPOTLIGHT FEATURE

Short features that supplement the main attraction are called spotlight features. The exact nature of the spotlight feature can vary widely, limited only by the ingenuity of the program planner. However, in some chapters the spotlight feature has become synonymous with a personality profile. The idea of singling out individuals for special recognition is good and has been a part in many chapter activities, but is not usually considered a spotlight feature.

The spotlight must be short, direct, and to the point. As a rule of thumb, it should not compete with the main feature for prominence on the program. To further eliminate any chance for confusion, the spotlight feature should contrast in style with the main feature.

For example, it might be a video on the progress of committee work, performing community services. At some meetings, the spotlight feature could carry a short, professional message. Spotlight features can cover a wide range of subject matter and presentation techniques. It is an excellent forum for experimentation in new and better ways to present information.

Suggestion for Company Chapter — Use the spotlight to emphasize your parent organization. A new pension program, planned construction, new products, etc., are all excellent opportunities to pass along "company news" and emphasize the professional aspect of your NMA chapter.

MAIN FEATURE

Many chapters would not think of having a meeting without having a main speaker. As old as this practice is, it can be shown that the more active and successful chapters maintain variety in their program features.

Research in adult education has shown that adults prefer to learn by participation. That is, they want to be part of the learning experience rather than a passive pupil, listening to a lecture. Adults want to discuss the situation and draw on their own experience to contribute to the discussion.

In trying to arrive at the number of speakers to have during the year, it is well to remember that some subjects must be "taught." This usually occurs when the subject matter is new and factual. An example might be a talk on the "New 911 System installed for the City."

Some meetings do require speakers and some do not. Examples of those requiring speakers might be the NMA Speakers Night, Top Management Night, and so forth.

When it comes time to set the program for the year, it is possible to decide how many more speakers and how many other activities are desirable. A review of many chapter programs indicates that a *good rule of thumb is; not more than five speakers, if a chapter has ten meetings per year; or not more than six speakers, if a chapter has twelve meetings per year.*

OTHER ACTIVITIES

If we limit the number of meetings featuring a speaker to five per year, what do we use at the other five meetings? Here are some suggestions of activities that can be used.

1. "Discussion Topics" or short "Case Studies" from NMA courses.
2. Retirement planning or career evening for local high school students
3. Panel Discussions
4. Political picnic or candidates' debate
5. Scientific (or not) demonstration
6. NMA Leadership Speech Contest, with invited high-school participants
7. Social Events
8. Recreational Events
9. Tours of businesses or manufacturing facilities in the community.

Staging the Meeting

Staging your meeting can be similar to staging a Broadway play. You apply effective lighting, use sound where appropriate, and whatever audio/visuals are necessary. Coordinate these with your program parts and follow your time schedule and you have the elements essential to effective staging.

During the “attitude adjustment period” and dinner, a good meeting planner will use the correct lighting to develop the atmosphere and create the right mood for the members. Background music, either live or taped, provides a relaxing quality.

Pictures of the main program participants can be projected on a screen during their introduction. With groups of 300 or more, this is helpful for people who are seated far away from the podium. Spotlights can have a strong impact on a program, when properly used.

FACILITIES AND FOOD SERVICE

REVIEW FREQUENTLY

There is a need to review frequently—how and where—a chapter holds its meetings. Some considerations are:

1. Costs of food and service
2. Changing tastes, attitudes and locations of members
3. Changes in neighborhood, restaurant management, traffic patterns, etc.

PERMANENT LOCATIONS VERSUS MOVING AROUND

There is a need to review reasons for having all meetings at the same place, as opposed to moving around.

1. Convenience for members
2. Variety in food and service
3. Ability to handle groups
4. Quality of food and service and/or pricing
5. Catering versus restaurant

TYPE OF SERVICE

The type of service can cause considerable variation in the cost, the amount of food, or the manner in which the meeting is conducted. Weigh the relative merits of:

1. Buffet
2. Family style
3. Table service

MENU SELECTION

Menu selection should be given careful consideration. This may be the most important part of any meeting. Some of the factors that affect the selection are:

1. Price versus the desirability of a particular menu
2. Satisfying many tastes
3. Degree of substitution
4. Special diets

NON-DINNER MENU

Although the dinner is almost an institution with the NMA, there is sound reasoning and some precedent for holding non-dinner meetings. One of the most compelling reasons is that many chapters are finding it difficult to engage space sufficiently enough to accommodate even a fraction of their membership for dinner. Other reasons for holding non-dinner meetings include:

1. More convenient meeting hours
2. Greater flexibility in the type of program presented
3. Easier to stage an outstanding program
4. Less expensive for both chapters and members
5. Emphasizes the professional rather than social aspect of the association

LIQUOR SERVICE

One of the most perplexing problems facing the program committee is in the area of liquor service. After the initial decision of whether or not to have liquor (many chapters don't), there are some questions that must be answered if liquor is to be served:

1. Length of drinking
 - a. Short time desirable—but every chapter must decide for itself
 - b. Bar open during meeting?...after the meeting?
2. Chapter operated bar versus restaurant operation.
3. Should the bar show a profit or not?
4. Are drinks included in the price of dinner?
5. How to handle the over zealous drinker.
6. Questions of liability.

PHYSICAL SETUP

Physical setup of the meeting room is important and should be reviewed from time to time to be certain it measures up to the requirements of the meeting style.

1. The Room
 - a. Large enough
 - b. Light, heat, ventilation, power, acoustics
 - c. Versatility and suitability for a variety of meeting formats
 - d. Convenient location with adequate parking
 - f. Individual tables versus banquet tables (round tables versus oblong)
2. Is Time available before the meeting to get properly set-up?
3. What Special Arrangement have been made for:
 - a. Public address system
 - b. Audio visuals
 - c. Stage
 - d. Drapes, décorations, etc.

FINANCIAL ARRANGEMENTS

A financial arrangement with the food service is always important to review. Have a clear-cut, written understanding how advance reservations will be handled and billed. How are "no shows" taken care of? How do you handle "drop-ins" without prior reservations? How many—over or under—the reservation list can be handled without penalty? Keep in mind, many food service facilities build in a percentage, over the guaranteed number, for greater than expected attendance.

VERIFY ACTUAL ATTENDANCE

1. Have written agreement on how to handle discrepancies between reserved and actual.
2. Take your own count of dinners actually served.
3. If you operate a "by the bottle" bar, take an accurate bottle count before the bar opens and after it closes.

ENTERTAINMENT

While no amount of planning can give you an ironclad guarantee of success, there are certain things you should do and should not do when arranging your entertainment. Avoid some mistakes and you've avoided many of the headaches.

The most important thing for you to do, to become a good planner of entertainment, is to study your group. Know your audience and know it well. Know the appropriate age range of your membership, the mix of the sexes and the different kinds of management jobs they hold. With these facts you have a fair idea of the type of entertainment which will appeal to them.

Review those entertainment programs that were well received in previous years. Did they enjoy the vocalist, comedians? Are they still talking about the choral group that they had two years ago? Their preferences will give you clues to successful programs this year. This year's choices don't have to be repeats or carbon copies of good acts from the past. Just knowing which categories were well received gives you a head start on planning entertainment for this year.

Be very careful with your entertainment budget. If you hire local talent, you can usually avoid paying transportation costs. Some suggestions are:

- Vocalists are almost always sure fire
- Instrumentals are good, but very hard to find
- Novelty comedy acts never miss
- Skits are expensive
- Good, clean comedy is always a hit
- Dance acts are good, but if you have to pay transportation costs, they can be cost prohibitive (Any dance act is only about 12 minutes long)

No matter how good, do not create a program longer than one hour. Today's audiences are restless and their attention span is shorter than that of their forefathers. The days of the three hour band concert are gone, and the smart planners know it.

MEMBER RECOGNITION

Each NMA chapter should have one monthly program devoted to recognition of its members, company personnel and/or civic minded people in the community.

Recognition for a job well done is very important to those who perform well. Don't allow their achievement to go by without the chapter's attention.

Plan and stage this program so that the award recipients receive the right recognition and exposure.

Be sure that your awards presentations are not long and boring. There is probably nothing worse than: "We will now present the XYZ Award winners," and then proceed to call each individual to the front, one at a time, to receive their awards and applause. This can really drag down—or even bring a lively meeting to a screeching halt.

PROGRAM BOOKING

SOURCES OF PROGRAM FEATURES

1. Your company's customers, suppliers and trade associations. Talk to your sales, purchasing and P.R. executives for contracts or leads.
2. Speakers bureaus of various organizations such as professional societies, Chamber of Commerce, local university or community college, military, and governmental services.
3. Professional booking agents.
4. NMA programs and discussions.

CHOOSING SPEAKERS

In reviewing program personalities, look for people who offer fresh insights into the field of leadership and management. The operative word here is "fresh." The basic content of many messages can be similar to what they already know. But if it is to persuade and motivate, it must strike with the force of discovery.

Sometimes this can happen with the sheer excitement of a speaker's personality. Charisma, overused word that it is, can still be an important factor in audience acceptance. Caution: there are some platform charmers who get by on personal magnetism alone.

What do others have? What most good speakers have learned is how to combine pleasant, individual impact with new useful ideas. You don't hear an excellent speaker trot out the dismal phrase..."and as I said before..." When a good speaker uses repetition to drive home a point, it's done dramatically. That's the kind of individual you want for your leadership development presentations.

One way to find good speakers is to keep alert to possibilities right in your area. Council meetings are a good source. Write letters to other NMA Program Chairmen and ask for their reports and recommendations. Go to the "Message Board" on NMA's Web Site asking for suggestions for good speakers.

Have a series of pre-season, brainstorming sessions with sub-committee chairmen. Collect names from every informed source. Your local newspaper should give you clues as to "interesting" local celebrities and spokesmen.

Speaker attrition is terrific. If you have as many as 10 programs to create, you'd better have at least 25 speaker names. When you start calling them, you'll soon develop the uneasy suspicion that you'll never fill your calendar because every group in the United States meets on the same date that you do.

Prepare to get excited about many excellent speakers who, for good and sufficient reason, just can't be fitted into your schedule. Brace yourself for all manner of turndowns and never give up hope. If you persevere, you will be able to book good programs for all your meetings.

Plan ahead and be ready to engage a standby program. Just in case that bridge does wash out or the speaker breaks a leg while mounting the stairs, someone or something must be provided on 15 minutes notice.

The **National Speakers Directory** gives excellent advice on finding the right speaker. The following is a brief outline from their section on "*Finding the Right Speaker*." The full directory is available by contacting the National Speakers Association.

10 TIPS FOR FINDING THE RIGHT SPEAKER

1. **The most important element in a successful meeting is finding the right speaker.**
 - Selection of good speakers may very well be most the important element in a successful meeting.
2. **Criteria for Selection of a Speaker**
 1. The speaker's credentials
 2. The speaker's expertise in a given field
 3. Content of a speaker's presentation is of great importance
 4. Check references

3. What sources are there for professional speakers?

- One of the best is personal referral.
- Another source is the Speakers Bureau. Their top priority is to place the right speaker for your meeting.
 - They can be especially helpful if you need suggestions on speakers to handle specific topics or sessions.
 - A reputable bureau and the speaker will quote the same fee.
 - If a substitute speaker was required due to an emergency situation, the bureau is a ready source.
 - In most cases, personnel of the bureau are personally familiar with the speaker, including his/her major strengths and audience appeal.
- The National Speakers Association is not a bureau and is not in a position to recommend or arrange speaking engagements. But it does provide a list of member speakers.
- Other sources
 - Local Chamber of Commerce
 - Local Association for Training and Development
 - Local Toastmasters

4. How Fees are Determined

As the demand for his or her talents results in a full calendar, a speaker's fee will escalate. It's a fact of the marketplace.

- Consider scheduling the speaker when he/she is working with another client in your geographic area. Travel expenses can be shared.
- Have a speaker do more than one program for you.
- If speaking for your group serves as a good showcase of that speaker's talent to others who hire speakers, he/she may negotiate the fee.
- The speaker may negotiate if he/she is allowed to sell products (audio/video tapes, books) from the platform.

5. Agreement of Terms

- You should have a letter of agreement. Identify the times and dates clearly. Find out the speaker's exact arrival and departure. Be sure that the agreement concerning expenses is clear with politicians or celebrity speakers that expect to bring their spouse or an aide.
- If you are planning for a speaker to attend social events before or after the presentation, be sure he/she is aware of this well in advance.
- Be sure to obtain the speaker's photograph and bio information so that your publications may present thorough information early as an attendance-building device. And send the speaker as much information as possible about your organization including company newsletters, annual reports and any relevant meeting bulletins. Be sure that you send the speaker copies of any material mentioning his or her presentation.
- Be sure you have mutual understanding regarding what promotion of their materials will be allowed. Since this can be a delicate matter, do not treat it lightly during your final arrangements with the speaker. Audiences often benefit from material which extends the value of the presentation, but you should be comfortable that your meeting is not an occasion for marketing. Also, if you want to tape the meeting, be sure you have, in advance, signed authorization from all participants.

6. Tell the Speaker Everything

- Be very specific concerning the size and demographics of your audience (age, gender, social and economic level, etc.). If there is good news or bad about your organization or company, be sure the speaker knows this. Names, buzz words, themes, or "insider" information...let the speaker know so it can be worked into the presentation.
- It would be wise to let the speaker know who has been on the program and what other speakers are scheduled.

7. Before the Speaker Arrives

- Provide a "Host"
 - Assign someone who does not have heavy meeting involvement to be your liaison with the speaker. That person should check to be sure the speaker's sleeping room reservation is in order and that the meeting room and audio/visual materials are as requested.
 - The first place most speakers want to go is the meeting room. The speaker will probably want to test the microphone and audio/visual equipment.
- Room Set-up
 - So your audience can receive the greatest impact from the speaker, the room should be with no more chairs than the anticipated attendance. You may consider roping off the back portion of the room so that early arrivals take the front seats.

8. A Bad Introduction Can Spoil a Good Speaker

- It is your obligation to the speaker and your audience to obtain the speaker's own printed introduction, which is usually designed to "set the stage."

9. Stay on Schedule

- A Professional speaker's presentation is well-timed and rehearsed, you run the risk of spoiling a superb presentation if it has to be cut...especially on short notice.

10. After the Presentation

- Last but not least, send the speaker the evaluations on his or her presentation. We all grow from feedback on our performance. A reference letter is appreciated with any publicity about the presentation.

PROGRAM EVALUATION

NEED FOR CHECKPOINTS

Just as a navigator sets a course and checks progress by comparing the actual position with where it was calculated to be, so it is necessary in chapter programming. Again, after comparing the position with the checkpoint, the navigator may find it necessary to make some correction in course in order to arrive at the destination.

The more information a program chairman has of the course and present position, the more chance of successfully reaching the objective. The more reliable information that can be charted following each meeting, the easier it will be to make any corrections necessary to achieve the goal.

METHODS OF EVALUATION

There are several methods of evaluation that can be used to give an idea of how successful any particular operation really is. For instance, there are:

1. Questionnaires
2. Personal Interviews
3. Group Interviews

PROVISION FOR PROGRAM SUGGESTIONS

The chapter is for all members so there should be some provisions for program suggestions from all segments of the membership. Generally, program ideas come from:

1. Past experience
2. Officers and board members
3. Members-at-large

FINAL ANALYSIS

The final analysis of how successful a chapter's programming is, lies in meeting attendance. If the programs are consistently good, members will turn out in large numbers. Let one bad meeting slip and attendance is sure to drop off the following month.

1. Keep accurate records of meeting attendance including notes on weather conditions, competing attractions, work load, etc.
2. Watch for trends and compare with previous year
3. Post summaries regularly for all members to see

***GOOD LUCK
AND
GOOD PROGRAMMING!***






Sample Program & Meeting Evaluation Forms

The following pages contain program & meeting evaluation forms that are currently used by some of our chapters.

We would like to thank the chapters that submitted these forms for this guidebook. Hopefully, they will be of assistance to you as you develop evaluation forms for your own chapter.

*Meeting Evaluation Form
Port of Seattle Chapter*

How'd We Do?

	PLEASE RATE	POOR	FAIR	GOOD
	The Food			
	The Service			
	The Location			
	The Speaker			
	The Subject			
To be filled out and compiled by the Vice-President of Programs				
DATE	SPEAKER NAME		SUBJECT	

MEETING EVALUATION

Date _____

Please rate the program held today on a scale of 1 to 5 (5 being the best possible score).

How do you rate today's speaker?	1	2	3	4	5
How do you rate today's topic?	1	2	3	4	5
How do you rate today's lunch?	1	2	3	4	5

Other comments/suggestions:

LEADERSHIP LINK

MEETING EVALUATION

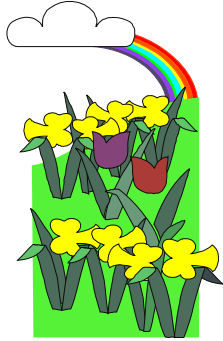
DATE	SPEAKER	TOPIC
------	---------	-------

Please rate the following: (1 [lowest] – 5 [highest])

1. Speaker	1	2	3	4	5
2. Topic	1	2	3	4	5
3. Meal	1	2	3	4	5
4. Facility	1	2	3	4	5
5. Time Management	1	2	3	4	5

Comments: _____

Boeing Leadership Association Meeting
Evaluation Form



**Spring into
new
Leadership!**

**BLA MEETING
March 15**

Overall Program:

- Excellent Good Fair Poor

Speaker Presentation:

- Excellent Good Fair Poor

Topic:

- Excellent Good Fair Poor

Snacks:

- Excellent Good Fair Poor

Door Prizes:

- Excellent Good Fair Poor

Meeting Room:

- Excellent Good Fair Poor

Have you visited the BLA Web Site? If so,
share your comments:

Comments or suggestions for Future
Meetings:

Boeing Leadership Association
Meeting Evaluation Form

MEETING DATE: _____

OVERALL PROGRAM:

Excellent Good Fair Poor

SPEAKER:

Excellent Good Fair Poor

TOPIC:

Excellent Good Fair Poor

MEAL:

Excellent Good Fair Poor

DOOR PRIZES:

Excellent Good Fair Poor

SUGGESTION FOR FUTURE MEETING:

COMMENTS:

PROGRAMS AND MEETINGS GUIDE

This form is used by the Port of Seattle to compare evaluations from month to month. You may want to use this or develop something similar for your chapter. The Purpose is to identify trends, preferred food and locations, speaker preferences, as well as, subject matter.

Program Evaluation Calculation Form

MONTH		COMMENTS	POOR	FAIR	GOOD
September	The Food				
	The Service				
	The Location				
	The Speaker				
	The Subject				
October	The Food				
	The Service				
	The Location				
	The Speaker				
	The Subject				
November	The Food				
	The Service				
	The Location				
	The Speaker				
	The Subject				
December	The Food				
	The Service				
	The Location				
	The Speaker				
	The Subject				
January	The Food				
	The Service				
	The Location				
	The Speaker				
	The Subject				
February	The Food				
	The Service				
	The Location				
	The Speaker				
	The Subject				
March	The Food				
	The Service				
	The Location				
	The Speaker				
	The Subject				
April	The Food				
	The Service				
	The Location				
	The Speaker				
	The Subject				
May	The Food				
	The Service				
	The Location				
	The Speaker				
	The Subject				
June	The Food				
	The Service				
	The Location				
	The Speaker				
	The Subject				
TOTALS:					

