Guidelines to Booking a Meeting

Booking a meeting takes a lot more organization than some realize. Even the best-coordinated meetings can be held back by unexpected circumstances. However, below are some helpful hints on various aspects to consider when booking a meeting.

Scenario: You are asked to set up a meeting. There are a few key questions you should ask – if you don't already know.

KEY QUESTIONS

I. Time lines – Estimated length of time for the meeting and within what time does the meeting need to take place e.g. two weeks, two days, etc. Usually good to identify a few available dates if possible.

II. Does the time line interfere with current bookings? If so, the current calendar bookings need to be assessed on what can be postponed in order to hold the more urgent meeting. It is not the Assistant's job to prioritize this; this is the responsibility of your supervisor.

III. Who are all the players? This will determine the size of boardroom required.

IV. Is the meeting pending key player availability or based solely on quorum?

V. If the meeting involves outside organization members, are the participants willing to attend the outside organizations office vs. the Tribes' office?

VI. Does the meeting require extra arrangements: recorder for minutes, laptop, teleconference phone, coffee/tea/water set-up. Is there a fee associated with using another department's coffee/tea/sugar/cream for meetings?

Once the above is established, it's time to move on the next portion.

ORGANIZING THE MEETING

1. Determine Boardroom Availability (Boardroom Calendar).
2. Check Committee Calendar to ensure there's no conflict with your current set of dates.
3. Communicate with each attendee that a meeting is being requested. This can be done via e-mail or may necessitate phone calls to determine each participant's availability. It's good to start with the ideal dates first and have a second choice of dates and times as back-up.

   Note: You should always have the contact numbers of all your participants. If you oversee committee, at the next meeting, ask each member to provide you with their contact information. If they are an outside organization, use the web to your advantage and search for their information, or call their office to ensure you have the correct contact information.

Provide a list of dates and times to remaining participants requesting a response of participant's availability. In this initial correspondence, especially when it's via e-mail, advise your participant's that you'll confirm the meeting details via calendar appointment.

4. Once the date, time, and place for the meeting have been confirmed, proxy in to the Committee and/or Boardroom Calendar to post in your appointment to ensure no other committee takes your spot.

5. Confirm the appointment with the participants either by phone call or e-mail a Calendar appointment to the participants, with a copy to yourself; if a participant has an Assistant, ensure you also copy them on the calendar appointment as they are responsible for maintaining a current schedule especially since their supervisor is often tending to business at hand. If you've confirmed via phone, ask the participant if they want a memo reminder sent to them.

    a. If a date is not determined among the key participants, you reassess the timeline and key players with your Supervisor, and start the process again from step 1.

6. *Optional*: If a meeting requires refreshment or special set-up, and you are extremely busy, set yourself a "Posted Appointment" in your calendar to remind you to set-up for the meeting.

OFFICE ETIQUETTE

If a boardroom is booked outside your own department, it's important that you, as the host, still take charge of the meeting. Even if it was deemed unnecessary to provide a full pot of coffee for the meeting, ensure you arrive early to the meeting to greet guests, offer them a coffee/tea/water, and direct them to the correct meeting area. It should not be expected for another department to host your meeting as they have projects and time lines of their own.

When a boardroom is booked, it's equally important to ensure the boardroom is left in a tidy state ready for the next meeting to use the room (this includes not only washing, drying – and putting away - the dishes/coffee pots, this also includes wiping down the boardroom tables and tidying up the chairs, etc.). If someone forgets, they have likely been absorbed in another project, so send a kind reminder or advise them their meeting has ended early.

The above are helpful guidelines and tips. You may find there are other things to consider, but the above is a good start towards setting a successful meeting.