

# project planning and management series

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## ACKNOWLEDGEMENT

The Project Planning and Management Series consists of a set of manuals and associated modules presenting practical approaches, tools and techniques for project planning and management. (See list on back cover). A product of the Government of Jamaica/USAID National Planning Project (1976-1980), the series was developed by the Project Development Resource Team (PDRT) of PAMCO for use in "action-training" workshops and reflects extensive experience in training and project development. All present PDRT members are contributing authors and have worked together in writing, revising and publishing the series. Special credits are due to Dr. Merlyn Kettering for design and development of the series; Dr. Bruce Brooks for writing final versions of many modules; Mrs. Marjorie Humphreys for assuming primary editing and production responsibility and for organizing draft papers into more useful materials; Mr. Lascelles Dixon, head of PDRT since 1979, for designing the cover and improving many of the illustrations; and Mrs. Christine Hinds and Miss Linetta Johnson for typing the drafts and final manuscripts. Any comments on the series and its usefulness are welcome.

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## MODULE 45

## ORGANIZING AND CONDUCTING CONFERENCES AND MEETINGS

*Bruce Brooks*

A. PREREQUISITES: None

B. DISCUSSION:

Project managers need to initiate, plan and conduct meetings and conferences with many groups during the process of planning, implementing and managing a project. This means that the manager must be aware of what is necessary to prepare for and conduct an effective meeting that will attain the desired project objective.

Too often meetings just happen. Those who organize meetings should recognize that the participants are not the only beneficiaries. The project to a very large measure, is also a beneficiary. The participants are busy people and cannot afford to waste time any more than the project team can. If a poorly planned and conducted meeting is held, the possibility of repeat attendance from the same audience is greatly reduced. The best way to overcome these problems is to plan and conduct meetings that:

- (a) are directed at a specific program objective;
- (b) deliver the material in the allotted time;
- (c) allow time for feedback and discussion; and
- (d) include plans for any follow-up action that may be needed.

The project manager should involve his project staff in the entire process. To assure that the involvement is real, they should be assigned specific responsibilities with the knowledge of what is expected of them and how they are expected to carry out these responsibilities. Everyone who is involved in planning and conducting the meeting must be aware of the total plan and be familiar enough with it so they will know where their responsibility begins and ends and what authority they have. The project manager must develop a co-ordination and control plan so he will know that the necessary actions are being carried out.

The length of the planned meetings does not absolve the planners from doing a thorough job. The same procedures are followed for short meetings as for longer ones. The difference is not in the length of meeting but in the number of staff that need to be involved and the

amount of co-ordination necessary. Planning and conducting a short meeting needs the same attention as a long meeting, but will require less staff, co-ordination and time because fewer persons are normally involved.

Meetings that are well planned and conducted are often the mark of an effective project management team.

C. PURPOSE:

The purpose of this module is briefly to outline the steps that are necessary for organizing and conducting a meeting that will reach the objective for holding the meeting.

Efficiently planned and conducted meetings are a means of conveying information to others that is believed to be necessary for attaining the objectives of the project. These meetings, if properly planned and conducted, can also be a very valuable tool for provision of feedback from those who have information and expertise needed to move the project forward.

D. USES:

The project manager and members of the staff can use this information to assist them in:

1. making pre-meeting preparations;
2. preparing for the actual meeting; and
3. planning and doing post-meeting follow-up.

E. ADVANTAGES:

Following a definite plan when organizing and conducting a meeting has the following advantages:

1. it reduces risk of failing to reach the objective of the meeting;
2. it permits a complete thinking through of who is to be involved, what is to be done, who will do each task necessary to hold the meeting, why the meeting is being held, where and how the meeting will be organized.

3. it involves staff and promotes esprit de corps;
4. it motivates the total staff; and
5. it can be used to build and promote the project and the staff.

F. *LIMITATIONS:*

Planning and conducting meetings and conferences requires time and staff resources. These resources have a cost and priority for use. When planning and conducting a meeting these points should be kept in mind by the manager and this activity should be built into the work plans for the project.

This module is a more detailed plan than is required for a committee, staff, or most internal project meetings. However, many of the suggestions are also applicable to these meetings.

G. *ASSUMPTIONS:* None

H. *OUTPUT:*

A detailed blue print for organising and holding a meeting which achieves the objectives stated for that meeting, and for carrying out the activities which follow the holding of the meeting.

I. *STEPS IN ORGANIZING AND CONDUCTING A MEETING:*

Step 1. *Pre-meeting planning*

- 1.1 Decide on the objective(s) to be attained by holding the meeting.
- 1.2 Discuss objective or reason for holding the meeting with key numbers of the staff and obtain their commitment to the objective(s).
- 1.3 Form a planning committee to assist in preparing a tentative budget deciding on the venue, audience, date(s) of meeting and development of a general statement of the objective(s) and nature of the proposed meeting.

This committee should be those people on the staff who will become members of the meeting planning

groups, if and when the meeting is approved.

- 1.4 Circulate the information developed by the above committee to a cross section of those who are likely to be interested in attending to get their reaction and suggestions on the meeting proposal. If it is positive, you are ready to provide the information that has been assembled to your administrators, asking them for their approval and endorsement of the plans. If their response is positive, you are ready to move to Step 2.

Step 2 *Planning the meeting*

- 2.1 Chairman of pre-planning committee (Project Manager) appoints a *Meeting Planning Committee*. Include those who were on the pre-meeting planning committee plus others who may be suggested or whose particular expertise may be needed.
- 2.2 Chairman of pre-planning committee turns over the information already gathered and instructs the committee, who reviews a proposed budget, venue, dates, etc.
- 2.3 Committee selects a Chairman, Vice-Chairman and Secretary.
- 2.4 Meeting Committee meets and sets up Sub-Committees. A Chairman for each of the Sub-Committees is selected from the members of the Meeting Planning Committee.

Sub-Committees are:

2.4.1 *Programme Committee*

- to prepare the agenda, contact and confirm leaders, prepare final agenda for the programme, and prepare revised estimated budget.

2.4.2 *Transport Committee*

- to arrange for transportation of leaders and special guests, field trips, and all matters dealing with transportation including an estimated budget for this activity.

- Step 3 *General Chairman holds Meeting with Chairman of Sub-Committees to:*
- 3.1 *organize a schedule of meetings with Chairman of Sub-Committees;*
  - 3.2 advise Chairmen of Sub-Committees that short progress reports are required on a specified scheduled basis (every week, month, etc.);
  - 3.3 enable Chairman of sub-committees to co-ordinate activities and exchange ideas to facilitate planning and execution;
  - 3.4 review the sub-committee plans and co-ordinates them with the estimated budgetary estimates;
  - 3.5 approve final programme in consultation with chairmen of sub-committees;
  - 3.6 approve guest list in consultation with chairmen of sub-committees;
  - 3.7 finalise budget for meeting with chairmen of sub-committees;
  - 3.8 approve committee plans and makes necessary revisions.
- Step 4 Sub-Committee chairman advises members of their respective committees and discusses in detail, plans for meeting with them.
- Step 5 Each Sub-Committee completes all preparations for the meeting.
- Step 6 Sub-Committees meet together with General Chairman to go over final plans and details for co-ordinating efforts.
- Step 7 *Hold the meeting.*
- Step 8 Post-meeting follow-up.
- 8.1 Project Manager and General Chairman send thank you letters to lecturers plus any gratuities they are to receive.
  - 8.2 Sub-Committee's chairmen submit all expense vouchers for payment.

DO NOT DUPLICATE WITHOUT PERMISSION

### 2.4.3 *Invitation and Promotion - Sub-Committee for Advertising Meeting*

prepare invitation list and mail invitations to prospective invitees; prepare materials to be used for promoting meetings and schedule the number and times of the mailings, radio spots, and newspaper ads., including an estimated budget for same.

### 2.4.4 *Housing Sub-Committee*

prepare estimated budget for housing, meals and refreshments. Sub-Committee working closely with the Invitation Committee makes arrangements for housing and any meals and refreshment breaks needed during the meeting for invitees, lecturers, and special guests.

### 2.4.5 *Physical Arrangement Sub-Committee*

working closely with the Program Sub-Committee and the Invitation and Registration Sub-Committee, makes arrangements for visual aids equipment needed by lecturers, decides on seating arrangement for groups and makes sure meeting place is sufficiently large, lighted and ventilated, and contains enough seats to accommodate the expected number of attendees. A programme agenda, writing and other materials should be available for all participants when this meeting convenes.

### 2.4.6 *Registration Sub-Committee*

working closely with the Invitation and Promotion Sub-Committee makes preparation for registering all attendees on the day of the meeting, providing them with the necessary written instruction about housing, meals, refreshments, and transport arrangements; collects registration fees, and keeps the necessary records of the fees that are collected.

Assembles all needed registration materials and instructs persons who will assist with registration in the use of these materials.

- 8.3 Office of General Chairman (Project Manager) duplicates and sends copies of relevant papers not distributed at meeting.
- 8.4 Office of General Chairman sends out meeting evaluation forms to attendees asking them to evaluate lecturers, facilities and the procedures followed. Also asks for any suggestions they may wish to make that they believe would improve future meetings.
- 8.5 Each committee chairman submits a statement of problems that his committee encountered, with suggestions for overcoming them, which should serve as guidance in planning future meetings.
- 8.6 Pays all vouchers incurred as a result of the meeting.
- 8.7 Prepares a financial summary of the meeting.
- 8.8 Summarises the evaluations and circulates to the staff involved.
- 8.9 Meets with chairmen of the sub-committees and discusses things that need to be done differently next time; highlights the performance of those who did a superior job. *Thank all of those who assisted, personally, if possible.*

Organizing and conducting successful meetings and conferences that move the organization toward its objectives is a very important part of any project administrator's job. The management of an organization cannot afford to slight the task of organizing and conducting good meetings and conferences. The manager should make it apparent to his staff that he views this as an important task to be taken seriously by every staff member.

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Project Planning and Management Series.

MANUAL - I Planning for Project Implementation  
MANUAL - P Project Planning  
MANUAL - M Project Management  
MANUAL - PF Pioneer Farm Implementation Planning

MODULES

1. Defining Project Objectives (Objective Trees)
2. The Logical Framework
3. Work Breakdown Structure
4. Activity Description Sheets
5. Project Organization
6. Linear Responsibility Charts
7. Project Scheduling - Bar Charts
8. Bar Charting for Project Control/Scheduling
9. Project Scheduling - Network Analysis
10. Milestones Description Charts
11. Resource Planning & Budgeting
12. The Role of PAMCO
13. Project Technology Analysis
14. Demand Analysis
15. Market Strategy Analysis
16. Project Area Analysis
17. Project Costs & Benefits
18. Project Profile
19. Financial Analysis
20. Cash Flow Analysis
21. Discounting
22. Net Present Worth Analysis
23. Cost-Benefit Analysis
24. Benefit-Cost Ratio Analysis
25. Internal Rate of Return
26. Social Analysis of a Project
27. Economic Analysis of Projects (including Border Pricing)
28. Financial Statements & Ratios
29. Project Selection & Ratios Analysis
30. Brainstorming
31. Decision-making System for Projects
32. Project Institutional Environmental Analysis
33. Ecological Analysis for Projects
34. Introduction to Contracts, Jamaican Contract Documents & Tendering Procedures
35. Selection & Use of Consultants
36. Project Documents for Planning & Implementation
37. Report Writing for Projects
38. Project Files
39. Formats for Pre-Feasibility & Feasibility Studies
40. Motivation of Employees and Personnel Evaluation
41. Design of a Project Management Control System
42. Evaluating & Forecasting Project Progress & Performance
43. Project Termination
44. Introduction to Lending Agencies
45. Organizing and Conducting Conference Meetings
46. Withdrawal of and Accounting for Loan Funds in the Financing of Projects