**An overview of Creating and Running a Meeting**

Firstly **create the Meeting** on the system. I suggest that you create meetings at least five or six months ahead so that they show in the calendar and in your members web or smartphone calendars. You may create meetings without adding the agenda for them yet and without giving them a theme. Once the meeting is in the calendar your members may use the system to advise you whether they will be there or not.

<http://easy-speak.org/kb.php?mode=article&k=32>

A month or two ahead of the meeting you must **create the agenda**. This allows you to assign members to each of the speeches and to other roles. The agenda is created by copying a template that best matches your need for this meeting (e.g. 'three speeches'). You may edit the agenda as needed and may then save the modified version as a new template or replace an old one. You access the selection by clicking on the 'Edit Agenda' button at the top of the meeting agenda screen. <http://easy-speak.org/kb.php?mode=article&k=35>

Use the 'Schedule Speeches' screen to **assign the speakers** at least four or five weeks in advance of the meeting <http://easy-speak.org/kb.php?mode=article&k=48> and use the agenda e-mail #3 to advise the speakers of their scheduled speaking date

It helps your club members if you **contact them with meeting details** on a regular timetable - that way they know that they can rely on you to remind them. They may go to the web-site and 'book themselves in' for a meeting at any time but the e-mail system is a good way to prompt for action. Please see the suggested timetable of actions at the foot of this article.

For our club (meeting two-weekly), I complete the role allocations just after the previous meeting, look to get all the gaps filled the next Saturday and send the final reminder out the night before. All these are sent by system-generated e-mail.

Use the **agenda mail #3** each time that you assign roles or make changes. It will ONLY be sent to people who have not previously been advised of that role and includes information about the role, whether it can be evaluated for CL, (for Evaluators, details of the speech that they are evaluating) etc to help the member. <http://easy-speak.org/kb.php?mode=article&k=8>

You will manually **assign speakers** and the **major roles** (for example Toastmaster and General Evaluator) using the assignment screen. You may assign all the roles if you wish, but you may also allow club members to volunteer on-line for some roles. If your club has been using the easy-Speak system for some time and has built up a history of the members' experience you may use the auto-allocation engine to assign most roles.

Assigning Speeches for the meeting

* <http://easy-speak.org/kb.php?mode=article&k=48>

Using the Role assignment screen

* <http://easy-speak.org/kb.php?mode=article&k=33>

Explanation of members volunteering for a role

* <http://easy-speak.org/kb.php?mode=article&k=6>

The agenda is available for all members to print their own copy by clicking on the 'Printer' button (top left just underneath the logo and meeting name). A detailed agenda for use by the Toastmaster and the Timekeeper may be printed by the Meeting Manager or any club officer by clicking on the 'Printer detail' button (next to the other printer button).

A '**Checklist Report**' is available from the agenda screen for a few days prior to the meeting.

This lists members on the Leadership Track with the projects assigned to them at this meeting which may be evaluated. It also lists any member taking a role for the first time.

Print this report and use it to ensure that the member's CL activity is evaluated and recorded in their CL manual. Note this information of the report and use it when confirming the meeting actual outcome.

During the meeting I suggest that you use your copy of the agenda with its attendance list to note any changes from plan. After the meeting you should go back to the agenda screen to re-assign roles and record unexpected attendance or no-shows. If your club recognises 'Best Speaker' etc you should record that information at this point. You need to action the actual role assignment and actual attendance to update member records.

<http://easy-speak.org/kb.php?mode=article&k=37>

If there was a guest or a new member signed up at the meeting you will need to add them to the system:

* <http://easy-speak.org/kb.php?mode=article&k=50>

**Note:**

Almost every meeting that you create will be a regular Toastmaster meeting with a formal agenda etc. You may also use the system to create a meeting of the Club Officers. If you use this choice the features of logging planned attendance and sending a reminder e-mail will be available but the meeting will only be visible to the club officers.

You may also use the system to create a social event. These events show on the calendar and are visible to all but do not have an agenda structure and do not use the system for logging planned attendance. I suggest that you use the Club E-mail system to publish the event and also put details of it on the welcome and news page.

**Suggested Timetable to Use Easy-Speak for an Outstanding Club**

**Create the meetings in the Calendar**

* Put all the meetings in the calendar so you always have a minimum of 3-4 months visible.
* This allows members to use the Signup screen and pre-advise you of non-attendance for vacation, planned seasonal work peaks, etc.
* Members who use an electronic diary, and have subscribed to your club calendar, will automatically have your meeting dates in their diary. (Menubar > Meetings > Subscribe to Web Calendar)
* Remember not to add a meeting for major public holidays.

**Add the agenda structure**

* As soon as you have agreed Contest dates with your Club President, use the appropriate template and add the agenda for that meeting.
* Make the agenda 'visible' to all members (Judges and any other contest roles that you have marked as being hidden will still only be visible to Club officers with the system permissions to assign roles at the meeting)
* Add the agenda for other meetings as soon as you are certain of the overall shape of that meeting - Are you gaining new members and will want a four speaker that week, or do you want to schedule an Educational presentation every fourth meeting etc?
* Always have the agenda in place at least 5-6 weeks in advance (at least 3 meetings if you meet twice a month) so you can schedule the Speakers to that timetable

**Schedule the Speakers**

* Review the Club Communications Chart for any members who have not spoken recently and who do not have a speech request in the queue.
* You may review their Personal Communications Progress screen, which shows their personal objectives, and also prompt them with an e-mail from the Club Chart screen. Or you may prefer to contact the Mentor - however that works in your club.
* If you have a member who is ready to deliver CC#10 be sure to talk with them about their first advanced speech, lend them the set of Advanced Manuals from the Club library so they can select the two 'free' manuals now and get their first advanced speech into the calendar before they deliver CC#10.
* Always plan to have the speaking roles scheduled at least three meetings in advance. This gives your members adequate time to prepare and will also avoids the panic hunting around for a speaker at the next meeting which sometimes happens in smaller clubs.
* Forward scheduling here is a big help to the members and also removes a big headache for the VPE.
* Use the Schedule Speeches screen to look through the current speaking plan for the next few meetings.
* Check for any Speakers who have not already confirmed their role and go to the meeting concerned to use Agenda e-mail #3 again with a personal message to 'nudge' them for a confirmation or advise you that they will not be ready or not able to attend that meeting.
* Look at the speech requests on the right side of the Schedule Speeches screen with the members' personal objectives and try to assign speeches to meet all the members needs.
* Assign the remaining speech slots from the open speech requests, (or add a speech when appropriate for a member who has not done this for themselves)
* Send Agenda e-mail #3 to advise the additional Speakers of their assignment. (E-mail #3 is only sent to people who have not been previously advised of this role)
* If your club is growing rapidly you may choose to keep one speaking slot available for a future Icebreaker - in which case make use of a 'Reserve Speaker' or 'Hotseat' role that will be available if you don't need to assign an Icebreaker at that meeting. (Maybe assign that to a Speaker who is scheduled at the following meeting - particularly if they have a history of not being well prepared for their speeches)

**Schedule First Roles for New Members and First time Major roles two meetings in advance**

* It can be very daunting and de-motivating for a new member to be assigned their first few roles without an explanation of the role, an understanding how this will fit into the CL program and how it will help their personal wish to be more confident in business meetings, or whatever their motivation for joining your Club.
* Try to assign these roles two meetings in advance and include a personal message on e-mail #3 to explain how this role will help them and where to get more information.
* Suggest that they sit next to the person delivering this role at the next meeting and talk to them about the role.
* Similarly, the first time a member delivers a major role, such as Toastmaster or General Evaluator, is best prepared in advance with some early notice to "watch a master in action at the next meeting" and then prepare to do it themselves at the following meeting.
* Send Agenda e-mail #3 to advise these members of their assignments (with a personal note if appropriate)

**Schedule Roles Needed for CL - Just after the previous meeting**

* Send Agenda e-mail #3 to members previously assigned a role for this meeting who have not yet confirmed their assignments (See above - New members and first time major roles).
* Review the Club Leadership Chart for obvious gaps where a member would gain by taking a specific role at this meeting (for example, the member has delivered a Table Topic and completed Grammarian so Ah-Counter would complete CL#1 for them)
* Send Agenda e-mail #3 to advise these members of their assignments (with a personal note if appropriate)

**Schedule the Remaining Roles - Just after the previous meeting**

* Note - if you want your members to be able to volunteer for roles, think through the timing for that to fit in with your ability to support new members, first time major roles and assigning the appropriate roles for CL.
* You may decide, for example, to open the ability for members to volunteer one day after you will make all the special assignments in the preceding paragraph and then delay your own assignment of any vacant roles (this paragraph) for a couple of days.
* To give good support for the members who don't volunteer you will still want to assign the remaining roles and send Agenda e-mail #3 several days before the meeting and do that consistently. This article explains the settings for members volunteering for meeting roles: <http://easy-speak.org/kb.php?mode=article&k=6>
* Make any specific role assignment that are requested or needed
* Use Auto-assign to fill in the remaining roles
* Look through that set of assignments and make sure that you are happy with it.
* Re-order the Evaluators if needed to avoid a Speaker repeatedly having the same Evaluator and to get a good fit between Speaker and Evaluator (You may use the blue/red arrow to move an assignment down to the next line)
* Send Agenda e-mail #3 to advise members of their assignments - with a covering comment to make it more personal.

**Follow up to Confirm Roles and Attendance**

* You will automatically be advised by e-mail is a member declines a role assigned to them.
* Return to the agenda screen and re-assign this role to another member
* Send Agenda e-mail #3 to advise members of their new or additional assignments - with a covering comment to make it more personal.
* Review the agenda screen at least a few days before each meeting for roles that have not been confirmed.
* Make phone calls if needed to ask where your members have difficulty in using the links on the e-mail and offer to talk them through the process.
* Making calls to ask if they will take the role is self-defeating - you will need to make this kind of call for every meeting and the members will just ignore your e-mail.
* (Hints on how to get reliable role confirmation in advance from all your club members are shown in this posting <http://easy-speak.org/viewtopic.php?t=66175> )

**Print the Agenda and Checklist Reports**

* Your club may expect members to print their own agenda, or have the Toastmaster or a Club officer print enough copies for everyone - or be totally paperless, but make sure that you will have enough spare agenda for any Guests

**Use the Checklist Report at the Meeting**

* Print the Checklist Report and take it with you to the meeting.
* This is your tool to confirm that all the members who were expected to have a CL role have brought their manual, found an Evaluator for the role and are actually planning to deliver the CL role that you and the system expect.
* Some clubs assign a special role to a member who will confirm that all the CL activities are happening before the meeting starts.
* Some Clubs assign this to a nominated Club officer or the SAA for the meeting.
* However you do it, get them to use this report and return it to you at the end of the meeting so you can use it to confirm the meeting actuals.
* During the meeting, be aware of any member who could use a Table Topic for CL#1 (they are listed on the report) and get that evaluation completed

**After the Meeting**

* Use the Checklist report to record any member who was expected but did not attend or unexpected attendance and any changed role assignments.
* Record 'Best Speaker' etc.
* Close the meeting
* If you have a member who completed an educational award, use the detail shown for their CC, CL, ACx, etc to submit this to Toastmasters International and then use the edit icon next to their name to recognise this achievement.
* Roll right around and assign the 'new' roles for the meeting after next and the remaining roles for the next meeting (see above)

**Is this possible??**

If your club has only ever prepared an agenda, often at the last minute - and nothing more - many of the actions listed here will seem unachievable.

I ask that you:

* consider if your club would be improved if you were able to do this
* consider how your members would gain if you are able to do this
* take my assurance that it is all easily possible - and that the VPE role becomes much more enjoyable, the club thrives and the members gain, when you do
* understand that I've been VPE several times, and coached many others, but have never spent more than 5 minutes per meeting on the routine of assigning roles, sending the mail, dealing with the drop-outs, recording the CL tasks etc.
* (I do spend up to 30 minutes a week on forward-looking member coaching, less if there are good Mentors in place)

**Hints**

* Spend your time on what matters for the members - personal contact - by automating all the routine actions.
* Have a reliable and regular routine so that members know what to expect from you and what is expected of them
* Don't send an e-mail about any meeting other than the next meeting without a personal note making it clear that this is for the future and not for the next meeting.
* Keep sending Agenda e-mail #3 as soon as you have assigned roles. It contains key information about the role at that meeting and members need time to prepare - or say that they will not be there and give someone else time to prepare for that role.
* Have a Co-VPE in place who can cover these same actions, in the same way, to the same timetable if you are suddenly unavailable or loose internet connection etc.
* This is an excellent introduction to next year's VPE. (A recent past VPE in the 'IT Support' role is also ideal)
* Don't chase around for people who don't respond to the e-mail. This is a problem only if you, or your predecessor, have created it and easily resolved (see above for link)