

People, Partnerships, and Communities

The Purpose of the People, Partnership, and Communities series is to assist The Conservation Partnership to build capacity by transferring information about social science related topics

USDA Natural
Resources
Conservation
Service

Social Sciences
Team

Social and Physical Aspects of Meetings and Conferences

The social and physical climate of a meeting can affect the success of a meeting just as much as the meeting content. A meeting set up properly can significantly improve the communication and productivity of a group. A well-prepared meeting reflects favorably on the meeting's sponsorship. This document is designed to help you coordinate and enhance the interaction of the social and physical aspects of meetings and conferences with the goal of conducting more effective meetings.

Types of meetings and conferences

Meetings and conferences are vastly different regarding their type, purpose, and scale. Some of the information in this document pertains to one-time conferences of more than 100 people, while other information is directed at regular monthly meetings of local folks who have known each other for many years. Consequently, the reader needs to apply common sense when evaluating whether or not to implement some of the suggestions contained herein. For example, for people who know each other and attend monthly

meetings, it does not make sense to hand out name tags. Conversely, if you are responsible for planning a conference for over 1,000 people, then you should plan to not only dispense name tags, but also to create ways to increase interaction, such as providing hospitality sessions.

What are good meeting planning skills?

People with meeting planning responsibilities should also have good communication skills. They should be people oriented and outgoing while conducting themselves in a tactful and polite manner. Meeting planners also need to be good organizers who see the "big" picture as well as pay close attention to details that affect meetings.



Developing a meeting agenda

The meeting agenda or program is one of the most important aspects of a meeting or conference. All of the functions of planning a meeting exist to support the meeting agenda.

Planning an effective agenda requires:

- Awareness of the organization's goals for the meeting
- Attention to the participants' level of interest and their knowledge level of the meeting topics
- Ability to select knowledgeable speakers, trainers, and/or participants
- A knowledge of how adults learn and interact
- Awareness of an environment that enhances learning and promotes social interaction
- A system of evaluation

Why should you market your meeting?

Marketing your meeting has **four main purposes**:

- 1) to notify everyone who is eligible to attend
- 2) to promote interest in the meeting or meeting topic
- 3) to increase attendance
- 4) to enhance the public's knowledge of an organization, its mission, and its products and/or services

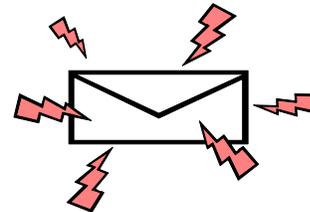
Marketing is mainly a function of distributing to the target audience information about who, what, when, where, why, and how to register to attend the meeting. A person who is interested in the topic, the organization, or the meeting may feel slighted if he or she hears about the meeting after it is over or when it is too late to attend.

How can you increase attendance?

Personal visits and phone calls



One of the most effective ways to increase attendance is to personally invite people to attend a meeting. Look them in the eye, shake their hand, and tell them the time, place, date, and purpose of the meeting. Also, tell them why their attendance is important to you and to the success of the meeting. A phone call is also helpful to encourage a person to attend a meeting. A phone call to an agricultural, conservation, or environmental organization's local office or its leadership is a useful marketing tool. You can get an idea of the number of representatives that will be attending the meeting. Staff or district directors can make these marketing calls.



Direct mail

Direct mail is the most common method of marketing a meeting. Letters, invitations, brochures, flyers, and reservation forms can be delivered by e-mail or regular mail to the offices and homes of people who may have an interest or who you are targeting to attend the meeting.

Other advertising and publicity

Newsletters, magazines, newspapers, radio, television, e-mail, and the Internet are all marketing vehicles that can carry meeting information in the form of paid advertising or free publicity. Space costs, issue dates, deadlines, and art requirements need to be considered when deciding which of the options to use. An agency or organization that is sponsoring a meeting may also publish its own newsletter. If all employees of an organization are invited to an organization's meeting, it should be publicized in the agency or organization's newsletter and on its web site.

Physical factors that impact a meeting's success

A number of **physical factors** may impact the success of a meeting. Some of these include:

- A. Site selection
- B. Room size
- C. Room setup
- D. Accommodations for people with disabilities
- E. Lighting
- F. Audio-visual needs.

A. Site selection

The meeting site should be selected based on the format, number of people expected to attend, and an audience profile (the types of people that will be attending the meeting). In addition, the meeting goals, objectives, and preferences of the attendees should be considered. Some suggestions on places to hold meetings are:

- Conference room in a city or township hall, or other government building
- Hotel
- Restaurant
- School
- College or University
- Convention Center
- USDA Service Center

Contact various sites to determine which one can best meet your needs. Visit at least three sites to make sure they can meet your requirements as to the number, size, and usage of meeting rooms, dates of availability, costs, and any other special considerations you might have.



Parking and other transportation issues also need to be considered when selecting a meeting site. A lack of parking or high parking costs can frustrate participants. For a public meeting, a site accessible by public transportation should be considered. In urban settings, consider time constraints because of heavy traffic and site accessibility.

B. Room size

The room should be big enough to comfortably seat all expected guests. If you expect 350 guests, for example, prepare seating for 400. If you expect 10, prepare for 15. The room should have adequate space to comfortably move around and meet other attendees. In addition, you may need space for exhibits and refreshments.

C. Meeting room setup

The meeting room environment should project the purpose of the meeting. The meeting purpose and presentation formats, in turn, impact the selection of a meeting site. Before selecting a site, determine the room(s) setup needs.

The person or team planning the meeting must evaluate the potential of the room(s) to be used during the meeting. By visiting several facilities and meeting rooms, obstacles such as low ceilings, windows, mirrors, uneven floors, worn carpet, posts, chandeliers, and lack of exhibit space are revealed.

There are five common ways to set up meeting rooms. The setup you choose impacts the meeting's social aspects. The five arrangements are:

- Theatre
- Classroom
- Conference /hollow square
- Banquet or rounds
- U-shape

A detailed look at each of these styles follows.

(continued, page 4)

People, Partnerships and Communities

Theatre

- Large meetings
- No tables
- Chairs in a row facing front

The arrangement of choice if you are featuring several speakers, a performance, or elaborate audio- visuals. This arrangement, however, may be crowded and the chance of getting participation from attendees is less. Those sitting in the back of the room may have difficulty hearing questions being asked by those in the front.

To set up: Do not crowd attendees when setting up chairs. Plan six inches between chairs and two to three feet between rows. If you plan to project audiovisuals, make sure the ceiling is high enough.

Classroom

- Large meetings
- Rows of tables with chairs behind, facing front

A good arrangement if there will be several speakers or extensive note taking. However, people at the back of the room may have difficulty hearing questions asked by those in front.

To set up: A lot of room space is needed because of the numerous tables and the spacing between attendees. Provide three feet between participants and three feet between rows.

Conference style/hollow square

- Best for meetings of less than 30 people
- Four or more tables are arranged in a square or rectangle
- Participants sit on three sides of the square or rectangle and focus on the person at the head, or sit on all four sides

It is easy for participants to see each other and also provides a writing surface. Everyone has the same amount of space.

To set up: Allow three feet between participants.

Banquet or rounds

- Round tables six to eight feet in diameter
- Each table seats six to ten people

This arrangement encourages interaction among meeting participants, in a training session for example. It is also a good setup to use when a meal will be served.

U-Shape

- Popular for meetings with less than 30 participants
- Four or more tables arranged in a “U” configuration
- Everyone, including the leader, sits on the outside of the “U” with the leader seated at the midpoint

Optimal arrangement for training sessions and speaker presentations. The openness of this setup encourages participation, while the amount of space between attendees avoids crowding. It also eliminates the sense of preferential seating because all seats have a good view of the meeting leader(s).

D. Accommodations for people with disabilities



The Americans with Disabilities Act (ADA) has requirements for providing access for people with disabilities. The registration form should identify any special needs of attendees. For example, doors should be wide enough to accommodate a wheelchair or walker. One should select meeting space on the first floor or in a building with elevators. **Information about regulations:** The ADA web site is <http://www.usdoj.gov/crt/ada/adahom1.htm>.

E. Lighting

Lighting is an important factor contributing to the effectiveness of a meeting. It is said, “Light equals Energy.” An especially well lit speaker area helps the audience focus their attention in the speaker’s direction. It also helps the speaker to clearly see all

People, Partnerships and Communities

of his/her materials. In addition, as the population ages, lighting becomes increasingly important to help people see clearly.

The entire room should be kept bright except when showing videos. The planner needs to be sure that the room selected for the meeting has appropriate and accessible lighting controls.

F. Audio-visual

Find out if speakers will be using audio-visuals, the specific equipment they need, and plan accordingly. Does the facility have audio-visual equipment, such as microphones and projectors? If they are not available, where can you rent the equipment and at what cost? Is there a budget for renting or buying equipment and accessories, such as carts and stands, extension cords, special and projection lenses, and for labor costs, such as setups?



Make sure there is sufficient equipment for the number of attendees. In a large room, for example, you may want to have multiple monitors or screens.

A general rule: The first row of the audience should be no closer than one and one-half times the height of the screen, and the last row should be no further away than eight times the height of the screen.

Other factors that impact a meeting's success

In addition to factors named already, additional areas that can affect a meeting's success include:

- 1) **temperature**
- 2) **head table**
- 3) **flag customs**
- 4) **speaker considerations.**

1) *Temperature*

The temperature should be set between 68 and 72 degrees. A cool room might keep the audience more alert while a warm room may cause the audience to become drowsy. While a cold room may distract an audience, a hot room can make attendees irritable.

2) *Head table*

The head table or podium used by the speaker should face a room lengthwise so he or she does not need to turn to make eye contact with audience members. It should be at least six feet from the first row of tables or chairs used by the audience. A head table should be elevated so the speaker(s) can have a better view of the audience and the audience will be able to see the speaker.

3) *Flag customs*

You need to follow the rules for proper handling of the United States Flag. United States Code, Title 36, Chapter 10 deals with how to display and respect the United States Flag during meetings. This information, provided by the Legal Information Institute at Cornell University School of Law, is at: <http://www.law.cornell.edu/uscode/36/ch10.html>.

4) *Speaker Considerations*

➤ **Before the meeting and after the speaker has been selected**

- Communicate with the speaker on a regular basis.
- If necessary, obtain material for an introduction of the speaker in advance of the meeting. You want to acquaint the audience with the speaker and his/her background, qualifications, and subject. Introductions should be brief -- not more than one minute.
- The invitation to the speaker(s) should include the time, place, type of meeting, format, and contact information. Confirm with a letter any invitation made by phone.
- Let the speaker(s) know the appropriate dress for the meeting. (If a conservation tour is part of the program, then suggest the speaker bring outdoor gear.)

(continued, page 6)

- Inform the speaker(s) about the time allowed for the presentation/training.
- Obtain a suggested title of the presentation from the speaker for inclusion in an agenda.
- Provide an agenda, even if it is a tentative agenda, for the meeting.
- Offer information to the speaker(s) about overnight accommodations if the guest is traveling a distance.
- Determine if someone will be accompanying the speaker.

➤ **During the visit**

- Make advance arrangements for someone to meet the guest upon arrival at the meeting site. (The person should be knowledgeable about the facility, the program, and the attendees.)
- Provide the speaker and guest with a final agenda.
- Allow the speaker an opportunity to “freshen up” before meeting others or going to the meeting room.
- If there is time before the meeting, introduce the guest to members of the audience.
- Offer assistance to the speaker in bringing in, setting up, and distributing materials.

➤ **After the visit**

- Send a thank-you note within one week of the meeting.

Have you considered these factors?

- Seeking suggestions for program content from target groups and potential participants.
- Obtaining details about what site facilities are available and when.
- Requesting microphones and any extra tables as necessary.
- Arranging (if appropriate) for a recorder to take notes during the meeting.



Meeting materials

Using appropriate materials helps the event run smoothly and contributes to the effectiveness of the meeting. It helps to further the goals of the group planning and implementing the meeting. Some of the materials that should be considered are:

Registration/reservation forms

Part of a meeting’s marketing package, registration forms are usually sent out to potential attendees with pre-meeting materials. In addition, they are usually available on a group’s web site. The registration form and/or accompanying materials should include a request for:

- Full name of person registering
- Organizational/ business affiliation and title
- Address
- Telephone
- E-mail and fax numbers
- Special needs of people with disabilities
- As appropriate: arrival/departure information, workshop preferences, and special food needs

and provide information about:

- Date(s) and time of meeting
- Location of meeting and, if appropriate, directions
- Hotel and rates
- Conference costs
- Information about workshops, tours, or other special activities
- Payment options
- Policies and procedures
- Deadline for registration
- Where and when to return the registration form

Note: Use a type size large enough for easy reading.

Programs and agendas

The purpose of a meeting program is to guide attendees through the meeting and inform them of what will take place. It describes the meeting sessions and gives times and locations that are of importance to attendees. Participants need to be aware of what will take place so they can plan accordingly. (A site visit, for example, may require special clothing such as boots or a jacket.)

Participant lists

A list of people who are expected to attend the meeting should be accessible to all participants. It allows attendees to be aware of people at the meeting whom they have met previously or with whom they would like to become acquainted. Participant lists are sometimes difficult for the meeting planner to organize because attendance plans change constantly. At smaller meetings, an attendance list can be circulated. Attendee lists can be mailed after a meeting to inform participants about who actually attended the meeting.

Exhibitor/sponsor lists

The names of exhibitors or sponsors of a meeting should always appear in the program. If an exhibitor has paid for space at a meeting, he or she has the right to a proper listing in the program. Sponsors are listed as a matter of appreciation and courtesy.

Name tags

Name tags for large groups, or even small groups of people who do not know each other, are important because they encourage social interaction. They can identify who is participating in a meeting as well as the participant's agency or organizational affiliation. Special name tags or ribbons can be used to distinguish speakers, honorees, or organizational leaders at the meeting. Name tags also can serve as proof of registration. Be sure to double-check the spelling of names on tags and in the program or on the agenda.

Signs

Use signs as guides to direct people to the meeting site. Several meetings may be taking place in the same building and attendees need to know where their meeting is located. A sign identifying the organization should be in the lobby and outside the meeting room. At a large meeting, a sign can be hung behind or attached to the podium or head table. Often the meeting site can provide or assist with signage.

Handouts

Handouts are important at many meetings. Speaker notes, and information about the agency or organization's program and services are effective tools. They promote understanding and retention of the program information and meeting goals.



Planning and budgeting the meeting

The person or team planning the meeting must identify all tasks, schedule these tasks in accordance with the required completion dates, and specify the staffing requirements that are necessary to complete the tasks. Responsibilities may be assigned to individuals within an agency or organization and/or to representatives of any co-sponsors of the meeting or training. When planning, be sure that the appropriate representatives sign all contracts that exist between parties involved in the meeting.

Six important factors that influence the success of the budgeting process are:

1) Identifying costs

Forgetting items is a common error when preparing a budget. Account for all expenses that will be incurred.

2) *Establishing procedures*

Budgetary guidelines can be an overlooked part of the budgeting process. Preparation of written guidelines for reducing or even waiving fees can help control costs.

3) *Competitive bids and written agreements*

Competitive bids with all written costs specified in writing can be important for controlling costs.

Openly discussing the budget with suppliers increases the value of the negotiation process. After a contract has been signed, negotiations are usually not effective.

4) *Historical data*

The organization or event's history, past budget, and financial reports are important tools for budgeting. For example, reviewing the financial data of last year's field day or RC&D annual meeting can be helpful. Keep an open mind because prices and priorities change from year to year.

5) *Formulas and standards*

Formulas and standards help the meeting planners budget for costs. An example would be the number of cups of coffee to order for breaks based on the number of attendees and number of breaks.

6) *Daily monitoring*

Frequent monitoring of expenses is important to keeping within a budget. Reduced costs in a certain area may compensate for higher costs elsewhere in the budget. Continuous updating allows adjustments to be made without ruining the budget.

Final details



As the meeting date draws closer, a few final details need to be considered. Prepare staffing schedules and instructions for everyone involved

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in the meeting. For a large meeting, include details for the registration area, door monitors, security, other volunteers, and the assigned contact person for the facility where the meeting is taking place. Check reservations one final time. Make sure any materials being shipped to the meeting have arrived, have been inventoried (if necessary), and are stored in the assigned area or appropriately distributed.

When the meeting is completed. Send thank-you letters to all who were involved in making the meeting possible. Evaluation forms and an attendance report should be tabulated and distributed as appropriate to meeting team members, supervisors/council members, and to speakers/trainers. Review the meeting bills to make sure they are correct and process as appropriate. And finally, consolidate your records so you have a resource for your next successful meeting!



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