

Unit 41: Chair and Lead Meetings

Unit reference number: Y/506/1924

QCF level: 3

Credit value: 3

Guided learning hours: 10

Unit summary

Every business will have meetings to give staff the opportunity to come together to determine business goals and plans for those achieving goals, including who will do what and when.

In this unit you will learn how to prepare to lead meetings to ensure that the meeting achieves the intended outcomes. You will chair a meeting, ensuring everyone's involvement and that the meeting has a focus that allows it to have the desired outcome. You will also deal with those matters that arise after the meeting to ensure that documentation is accurate and distributed to the correct people. You will reflect on the meeting to suggest how it could be carried out better in the future.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes	Assessment criteria
1 Be able to prepare to lead meetings	1.1 Identify the type, purpose, objectives, and background to a meeting 1.2 Identify those individuals expected, and those required to attend a meeting 1.3 Prepare for any formal procedures that apply to a meeting 1.4 Describe ways of minimising likely problems in a meeting 1.5 Take action to ensure that meeting documentation is prepared correctly and distributed to the agreed people within the agreed timescale
2 Be able to chair and lead meetings	2.1 Follow business conventions in the conduct of a meeting 2.2 Facilitate meetings so that everyone is involved and the optimum possible consensus is achieved 2.3 Manage the agenda within the timescale of the meeting 2.4 Summarise the agreed actions, allocated responsibilities, timescales and any future arrangements
3 Be able to deal with post-meeting matters	3.1 Take action to ensure that accurate records of a meeting are produced and distributed in the agreed format and timescale 3.2 Take action to ensure that post-meeting actions are completed 3.3 Evaluate the effectiveness of a meeting and identify points for future improvement

Information for tutors

Suggested resources

Books

Gutmann J – *Taking Minutes of Meetings (Creating Success)* (3rd edition) (Kogan Page, 2013) ISBN 9780749467241

Hood J H – *How to Book of Meetings: Conducting Effective Meetings: Learn How to Write Minutes for Meetings Using Samples: 1 (How To series)* (WordCraft Global Pty Ltd, 2013) ISBN 9780987557520

Websites

www.businessballs.com – Businessballs: includes learning and planning resources on running meetings, workshops and presentations

www.managers.org.uk – Chartered Institute of Management: offers practical advice on management issues with a range of online resources on management topics. Membership is required to access the materials

www.ksl-training.co.uk – KSL Training: offers a range of free training resources, including resources for chairing and managing a meeting

www.youtube.com – Youtube: range of videos providing advice on chairing meetings (use the search function to find appropriate videos)

Assessment

To pass this unit the evidence that the learner presents for assessment must demonstrate that they have met the required standard specified in the learning outcomes and assessment criteria and the requirements of the Assessment Strategy.

To ensure that the assessment tasks and activities enable learners to produce valid, sufficient, authentic and appropriate evidence that meet the assessment criteria, centres should apply the *Unit assessment guidance* provided and the requirements of the Assessment Strategy given below.

Wherever possible, centres should adopt a holistic approach to assessing the units in the qualification. This gives the assessment process greater rigour and minimises repetition, time and the burden of assessment on all parties involved in the process.

Unit assessment requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Business Administration, Customer Service and Management and Leadership in *Annexe A*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions; this includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

Unit assessment guidance

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the assessment requirements of the unit. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

There are opportunities to assess this unit holistically with the following units: *Developing Working Relationships with Stakeholders* and *Negotiate in a Business Environment*.

To achieve this unit, the learner must chair and lead meetings to achieve specific objectives, which may be to solve problems, take decisions, consult with people or to exchange information and knowledge. The meetings may be face to face or conducted remotely using appropriate technology. The meetings must have some element of formality to allow the learner to fully achieve the learning outcomes.

The main source of evidence to meet learning outcome 1 is a review of the learner's work products supported by professional discussion and witness testimony. The learner's work products could include meeting planning notes, notices of meeting, agendas and relevant communications (for example emails) sent to meeting attendees prior to the meeting (AC1.3 and AC1.5). These work products could be used as the basis for a professional discussion with the learner to meet the knowledge requirement of AC1.4, as well as to evidence the learner's knowledge and understanding underpinning their performance. For example, within the professional discussion the learner could explain how they identified the purpose, background, objectives and attendees for the meetings they have chaired (AC1.1 and AC1.2). They could also explain any formal meeting procedures that they had to prepare for, and how they prepared for these. Some of the assessment criteria, for example, AC1.3 and AC1.5, may require witness testimony from the line manager or colleagues.

For learning outcome 2, the main source of evidence would come from direct observation of the learner chairing and leading meetings. This evidence should be supported by a review of the learner's work products (for example action lists, minutes) and professional discussion around the learner's chairing style and the strategies they used to manage the agenda and facilitate involvement. For AC2.1, business conventions in relation to meetings could include the organisation's procedures and policies for meetings or generally accepted practice for conducting business meetings. Witness testimony from colleagues or the line manager would be useful to confirm competence over a period of time.

Evidence for learning outcome 3 would likely come from a combination of observation, review of work products and professional discussion. The learner's work products could include minutes from the meetings chaired, notes/reports on the effectiveness of the meetings and action lists. In the professional discussion, the learner could explain the criteria they used to evaluate the effectiveness of the meetings and how the identified points for improvement will help them to develop their chairing skills in the future.

The use of a reflective account is a suitable alternative to professional discussion throughout the assessment of this unit.

Evidence of Recognition of Prior Learning (RPL) can also be used within the unit to confirm competence.