# EFFECTIVE MEETINGS AND PROGRAMS

<u>Planning Effective Meetings.</u> Planning effective meetings is crucial to the overall success of your Inn. Consciously planning for collegiality, mentoring and education is key to the success of each meeting. Consider the desired outcome for each part of the meeting - the opening reception or cocktail hour, the dinner, the program presentation and the resulting discussion. Attending to the details will enhance the impact of the meeting.

Meetings create an experience for the participant. During the short period, they are your audience. It is the good or bad experience that they remember. You have control and responsibility for the experience.

Inns are required in the Organizational Charter to have a minimum of six regularly held, programmatic meetings. On average, Inns conduct an average of seven annual program meetings, not including banquets and special meetings.

Most Inns meet from September through May or June, but any meeting schedule may be followed as long as there are at least six meetings. Meetings should be scheduled on an easily remembered basis. For example, meetings would be held on the second Tuesday of each month.
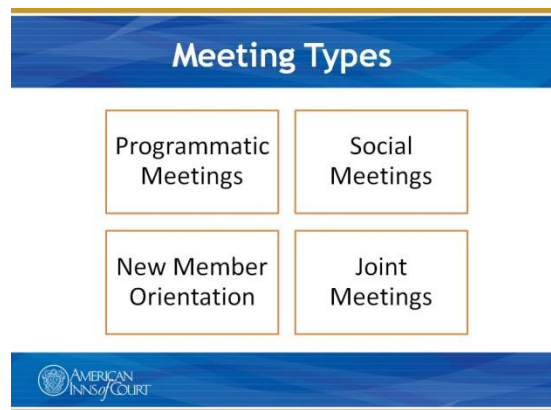
Many Inns have social meetings, such as holiday parties or end of the year banquets. Social meetings allow time for networking and create the opportunity for members to get to know each other on a personal basis.

New member orientation meetings are held prior to the beginning of the Inn year. The orientation meeting is the perfect time to introduce new Inn members to the organization the policies and guidelines of the local Inn. An orientation meeting also gives continuing members the opportunity to get together and look forward to the year ahead.

Joint meetings enable Inn members to engage with others outside of their own Inn membership, to learn from each other, and to help to build community ties. It is a great way to share the cost for a guest speaker or host other special guests with another Inn or organization.

These are the main types of meetings for an Inn. Other types of meetings can include: Meetings of the Masters, Executive committee meetings, business meetings, and Committee meetings.

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Selecting an appropriate meeting location is important to the success of your Inn. Many Inns hold meetings in the local courthouse where there is usually a dining hall adequate for serving dinner. Other Inns hold meetings in educational facilities, law firm offices, or restaurants.

Some Inns base the meeting location on the theme of the program. A few creative meeting locations include: a local theater, a baseball game, an art museum, and a women's shelter.

The dinner and meeting should be held in the same or contiguous space so that the Inn doesn't "lose" members going from dinner to the program or vice-versa.

Things to consider when selecting a meeting venue:
- Parking availability
- ADA accessibility
- Acoustics and audio visual needs
- Room set-up for the program
- Staging areas for the pupillage team
- In-house catering availability and fees vs. external caterers

Some type of meal function should be part of each Inn meeting. Sitting down to break bread together is a tradition derived from the English Inns. It provides an essential experience of Inn membership and contributes greatly to collegiality and mentoring opportunities.
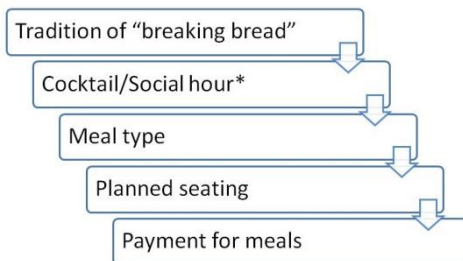
Many Inns have a cocktail hour at the beginning of the evening. It is a good idea to provide members with time to unwind and enjoy conversation before dinner or the program. A cash bar, as opposed to an open bar, helps to keep members' dues low. Alcohol may be served at dinner, but adds to the overall meal costs.*

The type of meal may vary and depends on what the members are willing to pay. Some Inns hold elaborate, catered meals, which in turn drives local dues higher. Determining an acceptable expense for the meal function should be decided upon by the Inn's executive committee.

Many Inns use some method of planned seating during meals. The advantage of planned seating is that all categories of membership can be interspersed to foster mentoring. A variation of assigned seating for the meal is seating by pupillage teams. The team presenting the program may assign a discussion topic during dinner and then have each team report to the

larger group after dinner. Random or spontaneous seating may not accomplish the goals of the Inn; people tend to sit with their friends and a good mix of members is rarely achieved.

Payment for meals should be collected as part of the dues at the beginning of the Inn year. There are problems with the "pay as you go" method of collecting money for meals. Members may feel less motivated to attend a dinner and a meeting for which they have made no prior financial commitment.

Special Note: **AICF carries a national general and umbrella liability policy covering all active Inns for its legal obligations for damages due to bodily injury and property damage. Because each Inn is an unincorporated association, liability may extend to the individual members and volunteers with respect to operations of the Inn.*

The Program chair will need to be involved in the budget planning process. The Program Committee chair will coordinate with the Treasurer, and will be able to provide the number of meetings to be held, where they will be held, and any special needs the programs may have, such as paid speakers or audio-visual expenses.

Some Inns have had success in securing sponsorships to fill in budgetary gaps. Consider having a law firm or organization contribute a sponsorship for a special event, a social event, or a happy hour.

Consistent attendance by all members is important to the success of the Inn meeting. An Administrator or Secretary should send out meeting invitations in a timely manner and track responses. Communications should include the date and time of the meeting, as well as relevant CLE information.

An established attendance policy that is followed encourages members to take the commitment of membership seriously and leads to meetings that are well attended. To make sure everyone is aware of it and to ensure impartiality, the attendance policy should be publicized on an ongoing basis by announcing it at each meeting as well as including it in the handbook and/or Inn website.

When creating an attendance policy, the following considerations should be addressed:
- Number of absences that will be allowed for the Inn year
- Use of excused absences and the difference between excused and unexcused absences

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- Action that will be required of the member in the event of excused and unexcused absences
- Financial implications for the Inn, with an example being Inns that have a "pay-as-you-go" policy may lose money when members cancel for a dinner meeting
- Role of guests/substitutes
- Who will enforce the policy and how the policy will be enforced
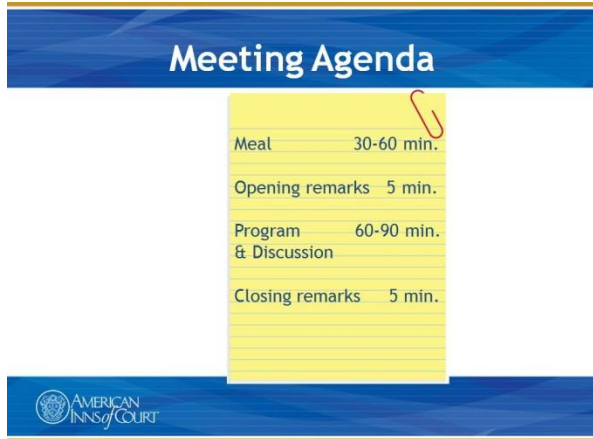
Once a location has been determined, the next step is to determine the amount of time that each meeting should take. It is important to communicate the duration of the meeting to all members and to start and finish the meeting on time. Attendance will improve when members can rely on the duration and timing of the meeting.

Meetings generally run about an hour and a half, exclusive of the meal function. Eating dinner before the program prevents the program from being cut short, or the dinner from being delayed.

The agenda for a typical Inn meeting looks something like this:

- ✓ Meal Function: 30-60 min.
- ✓ Opening Remarks by the President and Inn Business: 5 min.
- ✓ Pupillage Team Program & Discussion: 60-90 min.
- ✓ Adjournment: 5 min.

TOTAL TIME: around 2-3 hrs.

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Program Content Development

In this section, we will discuss many models for developing programs in an Inn– these materials are just examples – best practices. There are, of course, numerous variations on this model, and your Inn will ultimately have to decide which model is most appropriate. However, the model presented here should provide a gauge to measure the effectiveness of your Inn's program development and offer some possible solutions for any growing areas.

More samples/examples shared by other Inns can be found at
http://www.innsofcourt.org/localinnprogramming

First, the Inn's Program Committee should poll the members about the issues and concerns that are most important to them. The Inn should want to make sure they are addressing the needs of the members in their programs.

In the survey, ask Inn members which program formats they prefer (speakers, panel discussions, skits, game shows, blended formats, etc.). Be aware of different adult learning styles (audio, visual, kinesthetic) and incorporate different learning styles into the formats of program presentations.

The Program Committee should continue to poll the members throughout the Inn year for topic ideas. At the very least, the committee should do an annual poll of members for their issues and concerns.

All polling should be conducted and analyzed prior to the committee beginning its planning for the next year.

The Program Committee should choose the topics for the full year of Inn programs during the summer before the Inn year begins. Doing this not only ensures an organized, comprehensive approach to the Inn's programs, but also that no topics or issues are duplicated during the year.

The Program Committee should ensure that all topics they pick are relevant and supportive of the Inn's mission. While they may occasionally opt for a purely entertaining, non-substantive program for a banquet or special meeting, most Inn programs should deal with topics that support the mission.

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When developing topics, they should not only deal with a specific legal practice or skill, but should also explicitly include the AIC principle that is to be addressed. In other words, don't just choose a topic about "Withdrawing as an Attorney." Instead, focus the program on the ethical implications of the subject, such as "Withdrawing as an Attorney: Ethically Jumping Ship."

Successful teams do not happen by accident, and building a team should not be approached haphazardly. There are certain things that should be done and considered to help ensure that teams will be effective.

Team Assignments

First, the team assignments should be made before the Inn year begins. Next, teams should have an even distribution of member categories. There should be at least one judge on each team. If there are Inn members from the same firm or court, they should be assigned to different teams.

Choosing a team leader is probably the most important factor in determining a team's success. Team leaders are chosen by the Program Committee. The person chosen should not only be committed to the role of Pupillage Team and the Inn, but should possess qualities that will inspire members of the team. The team leader will not necessarily be the person who does the most work on the team.

The team leader should be a senior lawyer or judge and will serve as a member of the Inn's Program Committee. Be sure to choose people who are willing to make the additional commitment. The team leader will be responsible for calling team meetings frequently enough to achieve the stated objectives. The team leader should keep a record of attendance at team meetings.

The team leader may not have to actually assign tasks, as team members may volunteer for certain roles, but the leader should ensure that there is a fair distribution of work among team members. The team leader must be prepared to hold team members accountable for their assignments.

Topic Selection

Once the teams have been assembled, the Program Committee should then assign to each team one of the topics it has developed. The Program Committee should consider the perceived strengths of each team, and the relative complexity of each topic, when assigning topics and scheduling presentations. The Program Committee should consider the timing of the presentations when assigning teams. More complex topics may require more work, and therefore should not be assigned to the first or second meeting of the year.

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The team leader is responsible for calling team meetings, early enough and frequently enough to accomplish all of the tasks necessary to make a quality presentation. The first meeting of the team should include a discussion of the assigned topic. The team should decide on the core issues that will be presented, and then should brainstorm for ideas about how to effectively present the topic.

Format Selection
Next, find a format or multiple formats that work for the issues. Formats can include: skits, reenactment of historical/famous trials, mediation, jury deliberation, game show, or pre-recorded video segments. Be creative and mix formats, such as beginning with a skit and ending with a brief panel discussion.

Once the team is clear on the topic and the presentation format(s), the team leader should see that each team member is assigned to a task related to the program's development. For example, two to three members should work on writing the script for the skit, two members should work on preparing handouts, and two members should develop the discussion questions. Be sure that every member has a role both in the development and presentation of the program.

- Team leaders do not have to "do it all"- delegate key responsibilities to members of the pupillage team.
- Lawyers and judges have many talents aside from their legal abilities. Research the unique abilities of your pupillage team and utilize the resources of your team members.
- Seek out Inn members for future leadership roles within pupillage teams and within the Inn.
- Teams work best together when Inn leaders foster interaction among team members with regular interaction outside of monthly meetings.
- Chatter and other distracting behavior is common during presentations. Team leaders may have to re-direct that energy to appropriate discussion times.
  (Recommended by the American Inn of Court of Acadiana)

Develop Programs

Tips for Team leaders

- Delegate responsibility
- Encourage creativity
- Encourage future leaders
- Team build
- Crowd control

"The Wizard of Lawz" by the American Inn of Court of Acadiana

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Adult Learning

Successful programs incorporate adult learning principles. Simply stated these include:

- The reason an adult is learning
- Experience as the basis for learning
- Learner is responsible for decision making
- Content is relevant to the learner
- Problem-centered
- Internally motivated
- How has your Inn incorporated these principles into your program development?
- How can you use these principles going forward?

Program Presentation

All of the hard work of the Program Committee and the pupillage team pays off when the program is presented at the Inn meeting. The program is truly the centerpiece of the Inn and is often the most critical factor to an Inn's success. The Inn's members want a good program, and the team wants to present a good program. But good intentions are not always enough.

When developing the program, the team should consider whether it might be possible to "prime the pump" of interest among the members. Perhaps the team can build a little anticipation by sending out e-mail teasers or advance questions to the members. The team may want to poll the members as part of the research for developing the program. Sometimes, teams will begin discussion of the topic during the meal prior to the program.

At least one member of the team should serve as the discussion facilitator. Although the team may have an interesting topic and the presentation may be engaging, don't assume a discussion will be automatic. Sometimes, an audience takes a little prodding before a good discussion can happen. An effective facilitator, armed with provocative questions, can be a useful way to encourage a healthy discussion.

Every member of the team should have a role in the presentation of the program. The program should not be an opportunity for the biggest personalities to take center stage. Providing every member with a visible role helps to build collegiality among the members.

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Program Evaluation

The circular process that started with the members returns to the members by asking them to evaluate each program. It is critically important to solicit feedback from the membership about the quality and effectiveness of the programs that are presented. One should not assume that a program was effective just by the sense that it went well.

A sample program evaluation form is available on the AIC website. This or something similar should be used to evaluate each program. It is important to use a standard form for the entire year, so that programs can be measured consistently.

The program evaluations should be read by the pupillage team that presented the program, and all evaluations should be read by the Program Committee. The evaluations should not be thought of as votes for the most popular program, or in any way as a competition. The evaluations, taken together, should paint a picture of the Inn's educational effectiveness, and should be used as a tool to help improve the programs for the next year.

The results of program evaluations should also be a factor in the Inn's annual self-evaluation. Program effectiveness is an important indicator in the overall health and success of an Inn.

Sharing Inn topics, dates and locations by October 1st is a Bronze level requirement in the Achieving Excellence program. Inns using the Inn Management System simply enter their program information in the IMS. Non-IMS Inns can submit dates by email, mail or fax.

Submitting your program to the national Program Library is a great way to archive your program and share your Inn's creativity with other Inns across the country. All Inn programs must complete a Program Submission form and include all necessary materials to replicate the program (such as outlines, agendas, handouts, scripts, transcripts, videos, PowerPoint presentations, etc.).

Submitting programs is also a requirement for the Achieving Excellence program. 2 programs should be submitted for the Gold level and 4 programs for the Platinum level. Submissions are encouraged throughout the year, but are due by June 30th.

The Program Awards recognize exceptional programs presented at the local Inn level. Any program presented within the year is eligible to be submitted for award consideration, but the program must be submitted within 60 days of presentation.

Program submission guidelines and awards criteria are available on our website.

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Program Title _____

Date Presented _____ Inn Year _____

Presenting Inn _____ Inn Number _____

Inn City _____ Inn State _____

Contact Person _____ Phone _____

E-mail Address _____

Please consider this program for the Program Awards: Yes   No   This program is being submitted for Achieving Excellence: Yes   No
(Submit within 60 days of presentation.)

Program Summary:
Be concise and detailed in summarizing the content, structure, and legal focus of your program. Please attach additional sheets if necessary.

_____
_____
_____
_____
_____
_____

Program Materials:
The following materials checklist is intended to insure that all the materials that are required to restage the program are included in the materials submitted to the Foundation office. **Please check all that apply and include a copy of any of the existing materials with your program submission:**

Script   Articles   Citations of Law   Legal Documents   Fact Pattern   List of Questions   Handouts

PowerPoint Presentation   CD   DVD   Other Media *(Please specify)* _____

Specific Information Regarding the Program:

Number of participants required for the program _____   Has this program been approved for CLE?   Yes   No

Which state's CLE? _____   How many hours? _____   Pending   Approved

Recommended Physical Setup and Special Equipment:
i.e., DVD and TV, black board with chalk, easel for diagrams, etc.

_____
_____

Comments:
Clarify the procedure, suggest additional ways of performing the same demonstration, or comment on Inn members' response regarding the demonstration.

_____
_____
_____

Roles:

List the exact roles used in the demonstration and indicate their membership category; *i.e.*, Pupil, Associate, Barrister or Master of the Bench.

Role	Membership Category

Agenda of Program:

List the segments and scenes of the demonstration and the approximate time each item took; *i.e.*, "Introduction by judge (10 minutes)."

Item	Time

Program Awards: *Please complete this section **only** if the program is being submitted for consideration in the Program Awards.*

Describe how your program fits the Program Awards Criteria:

Relevance: How did the program promote or incorporate elements of our mission? *(To Foster Excellence in Professionalism, Ethics, Civility, and Legal Skills)*

_____

Entertaining: How was the program captivating or fun? _____

_____

Creative and Innovative: How did the program present legal issues in a unique way? _____

_____

Educational: How was the program interesting and challenging to all members? _____

_____

Easily Replicated: Can the program be replicated easily by another Inn?   Yes   No   This program is: Original   Replicated

Questions:

Please contact program library staff at **(703) 684-3590** or by e-mail at **programlibrary@innsofcourt.org**.

Please include ALL program materials. The committee will not evaluate incomplete program submissions.