

Guide to using forms A-F Accounting 1B Team Meetings

A number of forms have been posted on Blackboard to assist you in planning, conducting, and reviewing the effectiveness of your team meetings and activities.

- Form A: *Planning activities*
- Form B: *Delegating activities*
- Form C: *Team Tasks Meeting Agenda*
- Form D: *Mike's Bikes Meeting Agenda*
- Form E: *Meeting Minutes*
- Form F: *Facilitating and Participating in Meetings*

These forms are posted as Word files so you can download and modify them to suit your own purposes.

Meetings:

It is essential that your meetings have a structure and are well planned. Do not just get together and start working on a task without a clear sense of how long you anticipate the task should take or what you want to achieve (e.g. Do you want to complete the task or only part of it? If only a part, which part(s)? What should each team member contribute to the task?). Although imposing structure might seem time-consuming, it does in fact save you time in the longer term and should help you avoid conflicts arising from team members' different perceptions about what they feel they should be achieving in meetings, how long they have to spend in meetings, and so forth. The two maintenance roles of Coordinator and Recorder are crucial for the smooth conduct of meetings. (For information about team maintenance roles, see the information in your orange Course Materials book, Seminar 2.)

Your meetings will probably include discussion about what needs to be done, by when and by whom (i.e. planning and delegating tasks to members, brainstorming, coordinating, etc.). You can use the *Planning Activities* and *Delegating Activities* templates (Forms A and B) to help you plan these activities. In your meetings, you will most likely need to work on particular tasks (e.g. the Homework Task and the Newspaper Task or some aspect of the Mike's Bikes Task). Include time to work on these tasks in your agenda (*Team Meeting Agenda*, Form C). Your meetings might address aspects of all tasks (Homework, Newspaper and Mike's Bikes) or you might choose to have a separate meeting for Mike's Bikes. For this reason there is a separate template for the Mike's Bikes meeting (*Mike's Bikes Meeting Agenda*, Form D), which should have a more obvious structure (the managers' reports) than your general meetings. You can incorporate this template into the more general agenda template if you wish.

Under ‘forward agenda items’ in your meetings, include any unfinished business: work that needs to be completed (by whom and when?), information that needs to be compiled (and distributed to the team), any issues that have arisen during the meeting that need to be addressed. Never leave a meeting without a precise action plan and without having set a time for the next meeting.

The team member who is acting as the Recorder for the meeting should take minutes (*Meeting Minutes*, Form E) so that the team knows what has been discussed and what actions need to be taken, by whom, when and how (communication strategy), e.g. “Susan needs to email the newspaper article to the rest of the team by Tuesday 15th May”.)

Choose four meetings, preferably early in the semester, and have each member separately evaluate the meeting to determine whether you need to make any improvements and in which area(s) you need to improve (*Facilitating and Participating in Meetings*, Form F). Compare notes with other members and check for any discrepancies. For instance, one person might think that the discussion is firmly focused on the agenda items while others might think that the group is straying onto unrelated topics too often. Alternatively, you might all agree that you are not managing your time very well. Come up with strategies to address these issues.

If you are not performing well in meetings, you will have the opportunity to discuss this as a team in Seminar 8 and make the relevant changes to your team contract (homework for Seminar 9).

Assessment:

Although you will not be directly assessed on how well you plan and conduct your meetings, your planning and coordination will be reflected in your team’s performance. Teams that are organized, well-coordinated and that manage their time well tend to do better in assessment tasks than those that are less structured in their approach.

In addition, you are encouraged to include selected completed templates in your final report (as appendices) to demonstrate how your team has organized its team meetings. You can refer to these completed meeting agendas, minutes, and evaluation sheets when you are writing up your ‘reflections on teamwork’ as part of your final report.