

## Level 2 Certificate in Meetings



International  
Qualifications from EDI

### Syllabus

Effective from 2007



## **INTRODUCTION**

EDI is a leading international awarding body that was formed through the merger of the London Chamber of Commerce and Industry Examinations Board (LCCI) and GOAL, a leading online assessment provider. EDI now delivers LCCI International qualifications (LCCI IQ) through a network of over 5000 registered centres in more than 120 countries worldwide. Our range of business-related qualifications is trusted and valued by employers worldwide and recognised by universities and professional bodies.

### **Level 2 Certificate in Meetings**

#### **Aims**

The aim of this syllabus is to enable candidates to develop knowledge and understanding of:

- preparing for business meetings
- operating business meetings

#### **Target Audience and Candidate Progression**

This level 2 qualification will be particularly suitable for:

- those seeking employment in business who wish to develop meetings skills
- administrators, managers and secretaries working in business who wish to acquire and/or develop their meetings skills

#### **Level of English Required**

Candidates should have a standard of English which enables them to be understood in a business context. The level of English required should be equivalent to LCCI IQ Level 1 English for Business.

## **Structure of the Qualification**

The Level 2 Certificate in Meetings is a single unit qualification that consists of the range of topics detailed below:

### **Syllabus Topics**

- Purpose and types of meetings
- Arranging meetings
- Choosing a venue
- Agenda
- Criteria for success
- Role and responsibilities of the chairperson
- Role and responsibilities of the note-taker
- Role and responsibilities of the participants

### **Guided Learning Hours**

EDI recommends that approximately 35 Guided Learning Hours (GLHs) provide a suitable course duration for an 'average' candidate at this level. This figure includes direct contact hours as well as other time when candidates' work is being supervised by teachers. Ultimately, however, it is the responsibility of training centres to determine the appropriate course duration based on their candidates' ability and level of existing knowledge. EDI experience indicates that the number of GLHs can vary significantly from one training centre to another.

## **ASSESSMENT**

### **Assessment Objectives**

The examination will assess the candidate's ability to:

- understand the different types of informal meetings and their purpose
- discuss the advantages of meetings and the criteria for success
- identify factors to consider when choosing a venue and constructing an agenda
- describe the responsibilities of the chairperson, administrator and participants before, during and after a meeting

## Coverage of Syllabus Topics in Examinations

The full syllabus will be covered over a 3 year period.

### Examination Format

The examination duration is one hour. Candidates are required to answer 4 compulsory questions. Each question carries 25 marks.

### Answer Format

Unless otherwise requested, candidates will be asked to provide answers in one or more of the following formats:

- bullet points
- agenda
- short answers – lists, explanations

### Mark Allocation

A positive marking approach is used.

### Certification

Successful candidates will be awarded the Level 2 Certificate in Meetings based on the achievement of the percentages and grades below:

Pass	50%
Merit	60%
Distinction	75%

Candidates who achieve a pass or higher grade will receive a Full Certificate identifying the grade awarded.

### Recommended Reading List and Support Material

Title	Author(s)	Publisher	ISBN Code
Making Meetings Work	Alan Barker	The Industrial Society	1 858356 11 11

### How to Offer this Qualification

To offer this qualification you must be an LCCI IQ registered examination centre. To gain centre approval please contact Customer Support on 08700 818008 between the hours of 0830 and 1700 (GMT) Monday to Friday or by email on [centresupport@ediplc.com](mailto:centresupport@ediplc.com)

Alternatively you may contact your Regional LCCI Office or Co-ordinating Authority.

## Syllabus Topic

## Items Covered

### 1.1 Purpose and Types of Meetings

Candidates must be able to:

- 1.1.1 Explain the term 'formal' meeting, including:
- the meeting should be conducted in accordance with laid down procedures
  - the record must be in the form of minutes
  - the minutes must be signed by the chairperson after approval by the participants, dependent on company procedures
  - decisions must be subject to voting if consensus is not achieved
  - appraisal, disciplinary and grievance meetings are formal ones: meetings where third parties (HR and union representatives) may attend other than a note-taker
- 1.1.2 Explain the term 'informal meeting' including:
- meetings should be conducted properly but without the formal procedures
  - the chairperson/leader may participate in the discussion
  - the note-taker may participate in the discussion
  - notes may be briefer and in the form of action points
- 1.1.3 Identify the circumstances where informal meetings are appropriate, including:
- to make decisions
  - generate ideas
  - brief staff or others
  - exchange information
  - identify and solve problems
  - obtain views
  - gain acceptance in a group/organisation
  - eliminate rumour
  - save time
  - clarify arrangements
  - give instructions

1.1.4 Identify types of informal meetings, including:

- staff meetings
- team briefings
- working parties
- ideas workshops
- consultative meetings
- advisory committees
- social club meetings
- one to one meetings supervision between supervisor/manager

1.1.5 Identify types of formal meetings, including:

- annual general meetings
- extraordinary general meetings
- council meetings
- board of directors' meetings
- trustees and governor meetings for non-profit organisations
- senior management team
- appraisal
- disciplinary
- grievance

1.1.6 Identify the advantages of meetings over written communication, including:

- To obtain instant feedback
- To build up group/organisational identity
- To harness and develop ideas
- To increase motivation to achieve

1.1.7 Explain different methods of holding meetings, including:

- in an office
- in a meeting room
- in an outside location, e.g. a hotel
- by video conference
- by audio/teleconference
- by webcam/internet

## 1.2 Arranging Meetings

Candidates must be able to:

1.2.1 Explain the procedures for arranging informal meetings, including:

- setting the time and date
- arranging the venue
- inviting participants to attend
- producing and distributing the agenda
- ordering refreshments and/or lunch
- ensuring that all participants can participate fully irrespective of disability, learning difficulty, religion or culture

1.2.2 Explain the benefits of audio and web conferencing, including:

- speedy response
- ease of arrangement
- permanent record
- effective use of time
- avoidance of travel fatigue
- no travel or accommodation costs

1.2.3 Identify the role of ICT to support meetings, including:

- finding maps for venues
- planning routes for road journeys
- using travel sites for tickets and journey details
- using electronic communication
- using text messaging/voicemails for reminders
- searching for outside venues using the internet search engines and customer reviews

## 1.3 Choosing a Venue

Candidates must be able to:

1.3.1 Explain the standard requirements of a meeting location, including:

- accessibility
- accommodation and facilities
- security
- provision for disabled people
- health and safety

1.3.2 Explain the standard requirements of a meeting room, including:

- the size related to the number of people and the required equipment and layout
- the heating, lighting and air conditioning, etc
- the facilities for computers, internet access, etc
- accessibility to all participants

1.3.3 Identify and describe the advantages and disadvantages of different meeting room layouts, including:

- classroom/theatre
- horseshoe or U
- boardroom
- cabaret
- round table

## 1.4 Agenda

Candidates must be able to:

1.4.1 Explain the term 'agenda', including:

- the purpose of the meeting
- the topics for discussion
- the additional items as relevant including apologies, minutes of previous meeting, matters arising, any other business, date of next meeting

1.4.2 State ways in which an agenda can be prepared, including:

- requesting agenda items in advance from participants
- chairperson deciding agenda items
- requesting items for 'any other business' in advance from participants
- at the start of the meeting as 'hot issues'

1.4.3 Identify the needs to notify participants of the arrangements for the meeting, including:

- date, time and venue
- location and car parking/accessibility
- refreshments and break

- facilities for participants with disabilities

## **1.5 Criteria for success**

Candidates must be able to:

- 1.5.1 Explain the most important criteria for successful meetings, including:
- the purpose of the meeting is clear
  - the objective of each agenda item is clear
  - the agenda is distributed in time for participants to prepare
  - the chairperson/leader is in control
  - all members participate constructively
- 1.5.2 Identify the reasons why meetings may not be effective, including:
- the meeting is unnecessary
  - the items for discussion are unclear and/or not prioritised
  - the timing and venue is inappropriate
  - the members do not participate fully or constructively
  - the chairperson/leading is ineffective in managing the meeting
  - the participants are not prepared

## **1.6 Role and Responsibilities of the Chairperson**

Candidates must be able to:

- 1.6.1 Explain the role of the chairperson before the meeting, including:
- knowing the aim/purpose of the meeting
  - preparing/authorising the agenda, with time limits
  - being clear about the objective of each agenda item
  - preparing to introduce each item on the agenda, writing key point reminders of information to give, points to raise, etc.
  - in informal meetings, taking notes as well as chairing

1.6.2 Explain the role of the chairperson during the meeting, including:

- ascertaining that the number of members present constitutes a quorum
- organising adjournments of the meeting, if necessary
- opening the meeting
- welcoming the participants
- notifying apologies for absence received and noting those attending as proxy members
- asking those present to notify in advance any items which they wish to raise at the end of the meeting under 'any other business'
- asking for approval of the notes of the previous meeting
- keeping the discussion within time limits set in the agenda
- ensuring all members have an opportunity to participate
- dealing with any points of order raised
- stating the agreement reached
- stating all actions with names deadlines and reporting procedures as appropriate

1.6.3 Explain the role of the chairperson after the meeting, including:

- amending as appropriate, and approving, draft notes
- following up, or delegating follow up, of action points

## **1.7 Role and Responsibilities of the note-taker/administrator**

Candidate must be able to:

1.7.1 Explain the role of the note-taker/administrator before the meeting, including:

- checking availability to attend the meeting
- sending an apology to the chairperson if not available
- reading the agenda and papers received before the meeting and clarifying any points not understood

- ensuring that any dietary or access needs have been noted and dealt with
- any cultural and/or religious differences are taken into account in the planning and organisation of the meeting
- support for deaf and visual impaired participants is in place

1.7.2 Explain the role of the note-taker during the meeting, including:

- attending the meeting punctually
- taking effective notes using listening, paraphrasing and note-taking skills

1.7.3 Explain the role of the note-taker after the meeting, including:

- preparing an action sheet
- producing draft notes for chairperson's approval
- producing and distributing the final copy of the notes
- filing documents after notes have been completed and distributed

## **1.8 Role and Responsibilities of the Participants**

Candidates must be able to:

1.8.1 Explain the role of the participants before the meeting, including:

- checking availability to attend the meeting
- sending an apology to the chairperson if not available
- reading the agenda and papers received before the meeting
- preparing notes before the meeting for making contributions at the meeting
- informing the note-taker
- administrator of any special requirements relating to diet, access, or as a result of disability/learning difficulty

1.8.2 Explain the role of the participants during the meeting, including:

- attending the meeting punctually
- contributing constructively to the discussion
- making suggestions, contributing ideas, receiving information
- listening attentively to the contributions of other participants
- accepting guidance from the chairperson/leader
- noting the date of the next meeting in diary

1.8.3 Explain the role of the participants after the meeting, including:

- reading the notes of the meeting
- following up any individual action points
- filing the papers
- cascading information to colleagues

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and performance

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