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CU I&E Submission: Online Meeting Agenda & Minutes Builder [1]

Team Information

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Description

To paraphrase Mark Twain: “Everybody complains about the meeting, but nobody does anything about it.” Many of us organize meetings. So we share common challenges, like: How do we build an appropriate agenda, pull appropriate people together, and get someone to take minutes/follow up on action items? This is harder than it sounds! Not everyone in a meeting has equal understanding of every item/equal ability to recap discussions. However, these actions are essential to create meaningful events that are accurately documented (what happened during the meeting/what must happen after it). We overcame these challenges for the Controllers’ Monthly Meetings through an online form and streamlined business process.

- Individuals submit agenda items through the webform, which prompts for information often missing from previous emailed requests (item description, discussion leaders, discussion time, critical files).
- Submitted webforms generate emailed summaries to submitters/meeting organizers. These are used to build the agenda.
- Some webform fields are completed during the actual meeting (discussion recap, action items, persons responsible, timelines). Discussion leaders for each item summarize this information before we proceed to the next item. Now, individuals who are most knowledgeable about agenda items directly build the minutes for those items.

How does this benefit the University?

The new webform and associated business process save considerable time and effort, thereby saving the University both monetary and human resources. Meetings are more efficient. We no longer have to reschedule discussion items just because the “right” people weren’t in the room at the time. Minutes can now be distributed shortly after each meeting and action items can easily be checked, and status reported, at the very next meeting.

Implementation/Future Plans

We implemented the webform and the new business process in December 2018. (See: https://www.cu.edu/controller/forms/controller-meeting-agenda [2] .) We're considering using the same online form approach for other meetings and projects, however, an interesting development from this initiative has been a pervasive change in how we approach team events in general. We find our new good habits carry over to other meetings we arrange: we provide better information up front, and we routinely call for a recap discussion and identification of action items during those events. And, also exciting – we've seen some of our colleagues adopt the same approach in the meetings that they run.

Source URL:https://www.cu.edu/controller/i-e-awards/past-submissions/cu-ie-submission-online-meeting-agenda-minutes-builder

Links
[1] https://www.cu.edu/controller/i-e-awards/past-submissions/cu-ie-submission-online-meeting-agenda-minutes-builder [2] https://www.cu.edu/controller/forms/controller-meeting-agenda