

Section Toolkit

Planning and Hosting a Meeting

Resources for Section Leaders

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Overview

Each Section Toolkit is intended to provide resources and ideas to help a Section become more effective in delivering value and benefit to its local membership.

This Section toolkit is developed for Section leaders to assist as you plan and host your Section meetings. The quality of your local Section meetings will influence the opinion of your members about your local Section. Make your meetings interesting, easy to get to, appealing and you are well on the way to having a successful local section.

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Why local Section meetings are important

Section meetings are extremely important to develop your Section. Here you can interact with colleagues, local members can have networking opportunities, peer exchange and other industry members, contribute your own knowledge, and benefit from the experience and expertise of others. Section meetings also provide fellowship for persons involved in the prevention and control of corrosion.

Putting together a successful meeting involves:

1. Selecting a subject. The obvious choice of subject for a group of NACE engineers. However, many topics may be of greater interest than others. In choosing the topic, you should consider the mission of local industry groups.
2. Selecting a format. Formats that you might consider include:
 - dinner meetings
 - breakfast or lunch meetings
 - speaker contest
 - social events (picnics, holiday/family, etc.)
 - workshops, mini symposia (table top events)
 - joint sessions with sections of other societies

Types of Local Section meetings

TOURS/SITE VISITS	TOPICAL	REVENUE GENERATING
Industry Tours	Seminars/ Short Courses	Sports Tournament i.e. golf, fishing, clay shoots
Virtual Workshop	Rectifier School	Section Courses
Virtual Conference	Other	Vendor Day



Steps for Planning a Section Meeting

Determine Where and When

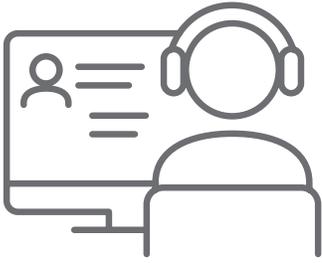
- The easiest way to determine the best date, time and location for your meeting is to survey the members. Tools such as Survey Monkey (www.surveymonkey.com) or Doodle Poll (<https://doodle.com/>) are free online resources that will allow your Section to quickly receive feedback from members and determine the ideal meeting time or location.
- Once your survey has been completed, analyze the results to determine the best date and time as well as possible topics.
- With a list of preferred dates and times, you can work on selecting the proper location. The selection of the meeting site can enhance the program and attendance at the Section meeting. Your Section may opt to have a regularly established meeting, such as the second Tuesday of every month over lunch. Alternatively, a Section may choose to vary the meeting time and location to meet the needs of many members. As a reminder, sections must hold at least one meeting of the general membership annually.



Invitations

- You can download your current member list in your area. This can be done through your NACE profile if you are the Membership Chair of a Section.
- Once you have your list ready, send out an email blast with your invite, but feel free to think outside the box as well. Other social networking tools are all available. Utilize the Section Toolkit for Marketing Support and Ideas to learn best practices and policies for sending Section emails.
- Encourage the members on your list to share the invitation with non-members.
- Check in and send reminders to your list leading up to the meeting. Good options are an email with additional information about the topic/ speaker, followed by a “last chance to register” email.





Prep for the meeting

- Once the RSVP deadline has passed, create your registration list (with plenty of room for walk ups).
- Work with the host venue to confirm all details are taken care of. Networking opportunities are an important aspect to NACE and Section meetings. This can be facilitated with refreshments of any kind. Generally, the host site determines what snacks or beverages are available depending on the time of day, attendance and costs.
- Take photos of the event if possible.
- Enjoy your meeting. You did an outstanding job.

Virtual Section Meetings

Whether it's for short, targeted working session or as a means to allow members or key presenters to join a face-to-face meeting that they otherwise aren't able to join person, being able to virtually participate in a meeting has some wonderful advantages. Use of this guidelines document will ensure that your NACE Section meetings will be as productive and rewarding as possible.

Determining the type of meeting - will aid in understanding how best to structure and conduct the meeting.

- What is the purpose of the meeting: Information sharing? Brainstorming? Group editing? Technical?
- Who needs to participate? How many people? Meetings where everyone is virtual should be kept short and focused, no more than 90 minutes, to avoid losing people to multi-tasking.

A successful meeting involving virtual attendees depends on good planning. What you do before the meeting is as important as what you do during the meeting.



Have a clear agenda – Establish an agenda which clearly sets out the topics to be covered, the desired outcome and expectations for attendee input for each agenda item (information, vote, decision, etc.), the amount of time assigned for each item, and who is responsible for presenting. This keeps attendees focused, on-topic, and engaged. If at all possible, schedule agenda items by time-of-day so that those calling in for a particular topic will know when to expect that item to be covered.

Choose times carefully – Select meeting times taking into account different time zones. If the meeting will last more than 90 minutes, build in deliberate breaks. If participants are joining for specific agenda items, place those at the beginning of the meeting or after a significant break to allow people to drop off when done.

Know who will attend – Pay special attention to those who will be joining from different time zones. This will help long distance attendees feel more welcome and allow the meeting to be structured to better accommodate different times.

Design the meeting with a common visual focus – Unless the meeting is just a short, small-group telephone call with a very simple agenda, plan to always have something visual to help focus attendees' attention. Use PowerPoint slides, the White-Board function, desk-top sharing, and any other tools to give participants a visual focus. Prepare a meeting "lobby" or "Stand-by" slide to use before the meeting starts so people joining know they're in the right place. Also prepare visuals to announce breaks, etc.

Plan the meeting with specific opportunities to engage all attendees – This is especially important so that virtual attendees don't succumb to multi-tasking or feel forgotten by the group. Look at the agenda and determine which items would benefit from input, and which tools would best support engaging the virtual attendees. On-line polling, annotation tools such as high-lighting and pointers, on-line white boards, etc. can be used to ensure all participants are active contributors.

Send out all material ahead of time – Ensuring participants have the agenda and any documents or presentations at least two days prior to the meeting (two weeks is better) is critical to making sure participants are prepared. This means that you must insist that presenters have their materials submitted in enough time to make such distribution.

Have a back-up plan – Virtual meetings depend on technology which may not always function as planned. This makes having documents and presentations ahead of time important in case the on-line part of the meeting is unavailable.

Know what tools the meeting will require – Look at the agenda and determine what virtual tools will be needed for a successful meeting. Will people be connecting via teleconference only or will they also be using an Internet collaboration tool (such as WebEx, Zoom, GoToMeetings, Microsoft Teams, Skype, FreeConferenceCall)? What desktop applications will be shared (Word, Excel, PowerPoint)?





Make sure participants are prepared – Ensure that all required information to connect to the meeting and take advantage of the tools is sent out ahead of time.

Do a dry run – Don't wait until five minutes before the meeting to find out you can't connect to the internet, you don't have access codes, microphones don't work, phone jacks or computer drops aren't live, or software isn't loaded. Set up a test meeting to confirm that all equipment works.

Arrive early – Arrive at, log into, or call in to the meeting early to ensure that all software and connections are working correctly.

Limit background noise – Mute phones unless speaking. Be aware of background noises (heavy breathing, typing, pets, children, traffic, etc.) and avoid subjecting the rest of the participants to these as much as possible.

Identify yourself – Knowing who is participating and a meeting and who is speaking at any one time is critical to a successful meeting. Participants should identify themselves when joining a virtual meeting. Always identify yourself when speaking.

Avoid multitasking – In a “connected” world it is hard to keep participants from checking their email or otherwise multi-tasking even when they are sitting at their desk. It is especially tempting for remote participants. But participants should be responsible for giving the meeting their full attention. Turn off cell phones, resist checking e-mail, and stay with the meeting.

Be polite – Good manners are especially important as people work to overcome some of the challenges of meeting virtually. Remember that virtual attendees cannot see body language, so speakers need to be mindful of how attitudes come across without visual cues.



Set expectations prior to the meeting

– Ensure that agendas, presentations, documents, and background materials are sent out ahead of time.

Verify connectivity – Before starting the meeting verify that everyone is able to hear and/or see properly.

Instruct attendees on processes/tools for providing input – At the beginning and then periodically throughout the meeting, review how attendees should signal their desire to ask a question or comment on an item (using the “raise hand” software function, typing a question in the Chat window, jumping in verbally, etc.).

Follow the agenda – Following the agenda and sticking to assigned times will keep participants in synch with what’s being discussed. Sticking to assigned times is especially important if individuals are joining just for certain agenda items.

Encourage feedback – Throughout the meeting, the chair or facilitator should actively seek out and provide feedback for virtual attendees. Conduct frequent process checks (every 15 minutes or after each agenda item) to provide opportunities for individuals to offer input and to keep participants engaged.

Conduct a meeting evaluation – At the end of the meeting, it is useful to poll all participants on what worked and what didn’t work well.



IDEAS AND RESOURCES FOR NACE AREAS AND SECTIONS

1. Resource: If you would like to host a meeting for more than 30 minutes NACE HQ has a limited number of zoom accounts, but we are happy to coordinate the use of an account for your section. We would be happy to use this as a way to transition one of your canceled in-person events into a virtual program.
2. Idea: Create webinars to address local issues. Tap a local or national speaker with a local contact to give the local/national view.
3. Idea: Consider simulcast events and divide the effort to create a virtual event with other sections/areas. This will also result in a larger pool of attendees.
4. Idea & Resource: Start a virtual book club for members of your community with an interest in a specific area of expertise. Select a book from the [NACE bookstore](#) and we will work with you to see if the author is available to lead a discussion and answer questions (if applicable).



5. Idea & Resource: Host virtual study groups for members of your community (and beyond) who are planning to take a NACE course or are studying for their exam. Call on local subject matter experts or contact us and we will reach out to NACE instructors to invite them to participate in your event.
6. Idea: Socialize for the fun of it! Bring your section members together for an informal virtual gathering. Organize a game of trivia with questions about your region and/or the corrosion profession.
7. Idea & Resource: If you've had to cancel a conference or event, ask your speakers if they would be willing to deliver their presentation live or in recorded format. If you do this and are open to sharing your content, we would be happy to send an invitation to other NACE Areas and Sections on behalf of yours.



Professional Development Hours

Sections may want to consider offering Professional Development Hours (PDHs) to attendees of educational sessions that are hosted. The PDH is a unit of measure that recognizes continuing education. Many State Engineering Boards require a specified number of PDHs as part of their renewal process. Requirements and qualifications for PDH credit vary among State Engineering Boards; however, most Boards will recognize activities that are technical in nature and relevant to the improvement of the engineer's job skills.

As a provider of PDHs, the following guidelines are recommended:

- At least 50 minutes of active presentation/participation is required for 1 PDH credit
- Technical presentations/educational sessions at Section meetings may qualify for PDH credit
- Attendees should be provided documentation of their attendance

State Boards have final approval authority on determination of credits. Members should check with their state Boards to confirm what is applicable for renewal credit.

A certificate is available on the next page.



Certificate of Professional Development Hours

Be it known

has attended a NACE
sponsored meeting on

In recognition whereof, Professional Development Hour(s) are awarded

Date

Section Officer

