



Meetings and Electronic Mail

Best Practices – District 7090



Best Practices - Meetings



- Every meeting - even for 2 - 3 people – should have written objectives and an accompanying agenda.
 - The objectives should be clear and indicate what is to be accomplished by the end of the meeting.

Meetings - #2

- Each agenda item should clearly denote its intent for “action”, “information”, “input” or “a decision”.
- If for “input”, the agenda item may focus on a specific part and refer to any obstacles that might be encountered during the implementation phase.

Meetings - #3



- Effective meetings have a high percentage of items indicating “for your input” or “approval”
- Coming together JUST to share reports and updates is not a good use of Rotarians’ time and resources.



Meetings - #4



- **Decisions** made and **actions** agreed upon should make up the essence of the meeting “minutes”.

- Minutes may be captured on screen or circulated within 24 hours.

Minutes should include the **decisions** made and **action** required (with a name). Additional meeting minute items might include “**for future consideration**” and “**notes**”.



Best Practices – Electronic Mail

- Emails should be used to share information or exchange documents.
 - Email is of little value for problem-solving.
- If an email gets passed around and around with different ideas emerging ... time to pick up the phone or call a meeting.

Email - #2

- If you are addressed in the “TO” line of the email
- this is **your** call to action.
- Tasks should be clearly noted in the text - using the name of
the person and the task.
- A “cc” to you requires no action.

Emails - #3

- The “subject” line is critical
- Key message and type of response should be obvious (e.g. for input or for information).
- Deadlines should be included.

Emails - #4



- Minimize use of the “cc” line; it should be clear WHY someone has been “cc’d”.
- Use elements of the 4-way test - “Is it fair to all concerned” and “does it build goodwill and better friendships”.
- Minimize the number of times that “reply to all” is used.



- Forwarding – if a new twist is added ... edit the subject line to reflect the change.
- The subject line should then clearly communicate the intent of the message to those in the “to” line.

- There are few applications of the “bcc” line for emails in Rotary
- Usually not fair to either the person in the “bcc” line (maybe I shouldn’t know this) OR the person in the “to” line who doesn’t know the information has been shared with others not identified.

When in doubt...apply the four-way test.



QUESTIONS