

Unit III: Group/Organizational Leadership Skills

2. Effective Meetings

Good management skills are essential for having effective meetings. In fact, effective meetings are one criterion used to measure the effectiveness of a group. This factor can help to determine if you want to join the group. Running meetings, delegating, and setting group goals are important skills for working with others. Organizing and leading productive meetings can increase the amount of business completed in a group, save time, and make group members want to participate. Learning how to build agendas, conduct meetings, and lead a group are important tools that all leaders need to manage a group effectively.

Meeting Guidelines

Guidelines for effective meetings are simple. The following concepts can be used for formal and informal gatherings to produce efficiently run and productive meetings (Pittrak and Hoopfer 1979):

1. Only hold a meeting if necessary.
2. All meetings must have clear objectives.
3. Invite a neutral person to facilitate sensitive meetings.
4. All meetings should have an agenda that includes:
 - topics for discussion
 - presenter or discussion leader for each topic
 - time allotment for each topic
5. Meeting information should be circulated to everyone prior to the meeting. Make sure to include:
 - meeting objectives
 - meeting agenda
 - location/date/time
 - background information
 - assigned items for preparation
6. Meetings must start on time so as not to punish those who are punctual. This also sets the stage for how serious you are about making the meeting effective.
7. Meeting participants must:
 - arrive on time
 - be well prepared
 - be concise and to the point
 - participate in a constructive manner
8. Meeting notes must be recorded and made part of your group's meeting archives.

9. The decisions made by the group must be documented.
10. Assigned action items should be documented, and the facilitator/ chair or an appropriate participant should follow up on the completion of all action items.
11. Meeting effectiveness must be reviewed at the end of each meeting and suggested improvements applied to the next meeting.

Set Objectives for the Meeting

Set objectives before every meeting! Before planning the agenda for the meeting, write down a phrase or several phrases to complete the sentence "By the end of the meeting, I want the group to. . . ." Depending on the focus of your meeting, your ending to the sentence will include very concrete phrases such as ". . . finalize a timeline to apply for funding," ". . . generate three ideas to increase our public presence," ". . . agree upon the annual budget," ". . . leave with an action plan," or ". . . decide on a nominating committee process for the board."

One benefit of setting objectives for the meeting is to help focus the meeting. The more concrete the meeting objectives are, the more focused the agenda will be. A second important benefit of having specific objectives for each meeting is that a concrete measure is created against which the meeting can be evaluated. Were you successful in meeting the objectives? Why or why not? Is another meeting required? Setting meeting objectives allows you to continuously improve the efficiency of your meeting process.

The Agenda

Creating an effective agenda is one of the most important elements for a productive meeting. Here are some reasons why the meeting agenda is so important (Pittrak and Hoopfer 1979):

1. Communicates important information such as:
 - meeting objective
 - topics for discussion
 - presenter or discussion leader for each topic
 - time allotment for each topic
 - expected process for each item (e.g., discussion, information, decision)
2. Provides a guide for the meeting.
3. Can be used as a checklist to ensure that all information is covered.
4. Lets participants know what will be discussed when distributed before the meeting—this information allows them to come prepared for the meeting.
5. Provides a focus for the meeting.

Develop the Agenda

Send an e-mail to the individuals invited to the meeting stating the date, objective, and location of the meeting. Ask those invited to accept or decline attending the meeting. Be clear in stating that once someone has accepted the invitation to the meeting, he or she is expected to attend (Pittrak and Hoopfer 1979).

Ask for input to the agenda and for names of presenters on specific topics. Once all of the agenda requests have been submitted, summarize them in a table format with the headings "Agenda Item," "Presenter," and "Time." The facilitator is responsible for ensuring that the agenda items are directly related to the goals of the particular meeting. If an off-topic

request is made, contact the person proposing the item and ask him or her to wait for a more appropriate meeting when more time can be committed to it. Also, be realistic in the amount of time allocated to each presenter. Don't cram a large number of agenda items into an hour-long meeting. When people agree to an hour-long meeting, they expect to be finished in an hour.

Typical Agenda Format for a Formal Meeting

1. Call to order
2. Reading and approval of the minutes from the last meeting
3. Reports of officers and standing committees (list officers and committees)
4. Reports of special committees (list committees)
5. Unfinished business (list items)
6. New business (list items)
7. Adjournment and next meeting

Expected Action

Properly prepared agendas make meetings run smoothly. Agendas that are too brief or vague can hinder the progress of a meeting. In a well-prepared agenda, items are explained. For example, an item listed simply as "Fair Board Committee Report" doesn't tell much; adding "select representatives and consider alternative date" says more. Indicate the expected action for each item using common phrases such as "for information," "for discussion," and "for decision" to convey what you plan to do. These phrases will help members anticipate and prepare for the action. If a particular person has responsibility for an item, place that person's name following the item. This information tells members who the contact person is and serves as a guide for the chair (Effective Meetings.com 2004).

Setting Agenda Priorities

The order of items on the agenda can be critical to the success of a meeting. For some items, the order is obvious. For example, the budget for equipment purchases is not usually discussed before equipment needs. Some agenda orders, however, are not so obvious.

Guidelines to Help Establish the Order of Agenda Items

1. The early part of a meeting is usually the most lively and creative. Therefore, items requiring mental energy, bright ideas, and clear heads should appear early on the agenda. An item of great interest to everyone might be scheduled for 15 or 20 minutes into the meeting to avoid the attention lag that typically occurs at this point and to also involve any late arrivals.
2. The order of items influences the meeting atmosphere. Some items tend to unite the group, while others divide it. The leader may want to start on a point of unity, progress to items likely to evoke differing opinions, and end the meeting on a unifying note.
3. Long agendas require momentum because members need to feel that progress is being made. Use the labels "information," "decision," and "discussion" to help set the agenda. Information items should come first or last. Since they require no group action, they should be brief. Decision items should come early on the agenda. If an information or a decision item becomes a discussion, table it until you are ready for the discussion items. This procedure may not cover the entire agenda but will keep the meeting on track and leave members with a feeling of accomplishment.

Distributing and Revising the Agenda

Copies of the agenda should be provided to all members via e-mail or regular mail several days before the meeting. Be sure to ask presenters if the order of the agenda is okay and if they have enough time for their topics. Minutes from the last meeting or an abbreviated set of minutes listing decisions and needed action should also be distributed at that time.

The meeting agenda must be flexible and open to revision. Early in the meeting, the presiding officer should ask the group to review the agenda. Have any pressing issues been omitted? Is there need for some revision? When making revisions, consider meeting time. Do not lengthen the meeting time; instead, decide which items can be deferred to a later date.

Resist listing "any other business" at the end of the agenda to save time in planning. Try to fit all topics into specified agenda components. While unstructured discussion is healthy, it should be managed to be reasonably productive and occur only if time permits and the meeting can be closed on a positive note.

Information sent with the agenda should indicate:

1. Name of the group
2. Title or topic of the meeting
3. Name and phone number of a contact person
4. Time, date, and location
5. Decision-making method to be used
 - Majority rule (most people have to agree)
 - Consensus (all people have to agree)

Preparing for a Meeting

Working and learning in a meeting will occur most effectively when everyone is comfortable and relaxed. Participants should feel that the time they have spent at the meeting is worthwhile. Although no one can guarantee that all meetings will be regarded as meaningful, the chair or facilitator can take some steps to make the meeting as effective as possible by carefully arranging for facilities and materials, as well as a comfortable social environment. The attachment “Effective Meeting Planning Sheet” on page 6 provides ideas for preparation.

About Time

When it comes to time, too much flexibility can be more of a hindrance than a help. Time is important to most people. Therefore, the meeting should start and stop at the time specified. Late starts penalize people who arrive on time and make ending the meeting on time difficult. Repeated late starts encourage people to arrive at a later time and to form bad habits. Follow the time frame for the agenda topics so that items and speakers at the end of the agenda are not overlooked. Meetings that drag on past the ending time can contribute to feelings of guilt, resentment, impatience, and tension. Schedule breaks during long meetings.

Name Tags or Table Tents

If group members are unfamiliar with each other, name tags or table tents are important. They will speed the development of group cohesiveness since participants will be able to use names in addressing each other. To be useful, name tags or table tents should be large enough to read across the table.

Materials

The speaker or facilitator may want to use visual aids. Double check equipment needs such as an LCD or overhead projector, slide projector, tape recorder, and so forth. Extension cords, spare bulbs, and a small table to hold the equipment and visual aids should also be on hand.

Social Setting

The social or emotional environment of a meeting can affect the way group members, including the leader or facilitator, relate to one another. Trust and respect are among the most important foundations of the social environment for a group. Until individuals learn to trust each other, little progress is made on group tasks. Information about learning and working styles, as well as enthusiasm and enjoyment, are also key features of a satisfactory social environment. Refreshments build group togetherness and congeniality. Food and beverages should be prepared ahead of time so that they are available when the first person enters the room or the break starts. Make sure enough napkins, cups, and paper plates are on hand.

Physical Setting

Participants in meetings will contribute more and get more out of the meeting if the physical setting is comfortable and the atmosphere is supportive and relaxed. Desirable physical arrangements will vary depending on the size of the group and the purpose for which the meeting has been called. Informal room arrangements are recommended to make everyone feel reasonably comfortable and equal in the group. If necessary, arrive early to check the meeting room. Some rooms are not suitable or might require additional arrangements to promote positive group development.

Room Arrangements

Select a room that is large enough for several small groups to meet simultaneously or to accommodate a single large group. If possible, select a room with furniture that can be moved easily, especially if rearranging furniture for small-group discussions seems likely.

In small groups (up to 20 people), chairs can be arranged so that everyone is facing each other. Having plenty of space for each participant to sit and work, take notes, or spread papers for notebooks and handouts is important. Tables should be available, unless the meeting is very short or very active.

To accommodate a large group, rows are a better arrangement. Curving the rows in a half moon shape with ends closer to the front improves visibility and cohesiveness. Make sure that extra chairs are available to accommodate a larger than expected crowd.

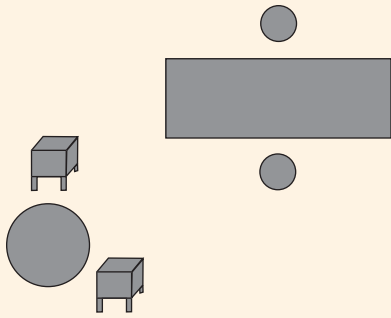
In a small group, the facilitator can sit among the group members. In a larger group, the facilitator should stand so that he or she can see the group and also be seen by the group. Avoid a head table or podium at small, informal meetings since they emphasize the “power role” of the facilitator through its physical separation. A podium also indicates a larger difference in status than if the facilitator is standing in front of the group without a lectern or table as a barrier.

Consider the arrangement of chairs:

- Face chairs and people away from doors and windows.
- Beware of energy holes. Take unneeded chairs away from table (empty chair = energy hole).

Room Arrangement

Office/Desk



Advantages
Creates authority
Separates individuals

Disadvantages
Can be seen as threatening

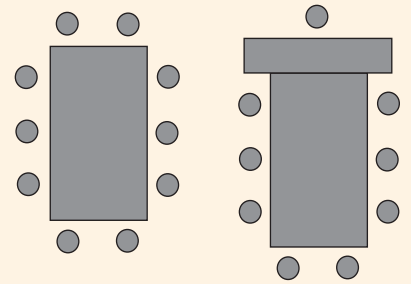
Individual Tables



Advantages
Builds teams
Easy for leader to move around

Disadvantages
Increases side-bar conversations
Requires wide room

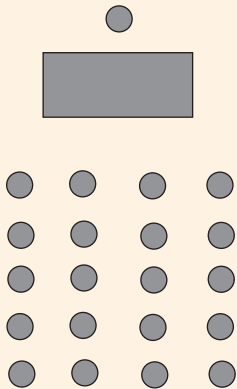
Rectangle/Focused Rectangle



Advantages
Good for staff meetings
Leader can assert control in front of the room
Encourages discussion

Disadvantages
Limits number of people to size of table
Reinforces hierarchy

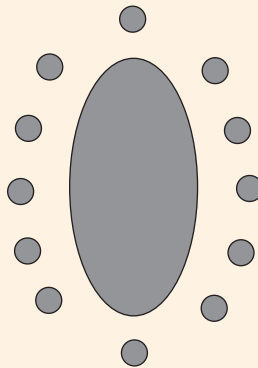
Classroom Style



Advantages
Allows for many people
Leader is clearly in charge

Disadvantages
Encourages one-way communication
Encourages side-bar conversations
Hard to hear in back of room

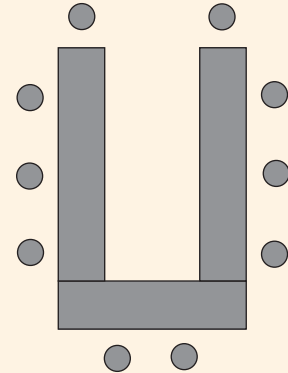
Circle or Doughnut



Advantages
Good for unifying morale of people

Disadvantages
Hard to know or recognize a leadership position
Limits number of people to size of table

U-Shaped



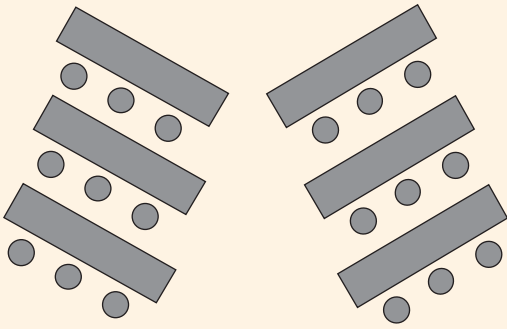
Advantages
Convenient for 6 to 20 people
Easy for leader to have eye contact with all

Disadvantages
Discourages small-group teambuilding
Reduces getting to know other people
Limits movement of leader

(continued on next page)

Room Arrangement (continued)

Herringbone



Advantages

Allows use of tables for many people
Creates center aisle
Equalizes status of group members
Easier to see everyone

Disadvantages

Hard to hear in back of room
Creates impersonal mood

Think about ways the arrangement of the room affects interactions that take place in a meeting. Using the diagrams on page 5 and 6, think about which room alignment:

- Suggests “we talk, you listen” or “you talk, we listen.”
- Implies participation and work to be done by audience.
- Will allow for maximum participation by the most people in the shortest amount of time.
- Will allow an “axe grinder” the largest audience.
- Fosters confrontation among diverse or polarized interests.
- Will allow input from all participants on an equal level.
- Will allow a maximum quantity of information to be presented in a short time.

Effective Meeting Planning Sheet

Meeting Title:		Purpose or Objectives:	
Date:	Time:	Location:	
Committee(s) Involved:		Members:	
Chair(s) of Committee:		Facilitator(s) for the Session:	
Tasks	Specifics	Who Will Do It?	By When?
Facilities (check the following): <ul style="list-style-type: none"> ■ Is the location central? ■ Is the facility ADA compliant? ■ Is room large enough if small groups need to meet at the same time? ■ Can walls be used to post newsprint? ■ Can temperature and ventilation be controlled? ■ Can lighting be controlled? ■ Are enough tables and chairs available? ■ Can the furniture be moved around freely? 			
Access (check the following): <ul style="list-style-type: none"> ■ Are keys available to all areas that will be used? ■ Are restrooms accessible? ■ Is a phone available? ■ Is there adequate parking? 			

(continued on next page)

Effective Meeting Planning Sheet (continued)

Tasks	Specifics	Who Will Do It?	By When?
<p>Materials (check the following):</p> <ul style="list-style-type: none"> ■ Microphone (set up and working) ■ Easels/chalkboards ■ Markers and chalk ■ Newsprint and tape ■ Overhead projector ■ Laptop computer ■ Video projector ■ Internet access ■ TV/VCR/DVD ■ External speakers ■ Audio tape recorder 			
<p>Publicity/Promotion:</p> <ul style="list-style-type: none"> ■ Distribute brochures/fliers to public places ■ Distribute news releases to newspapers and media ■ Make media contact with reporters ■ Arrange for pictures 			
<p>Registration:</p> <ul style="list-style-type: none"> ■ Direction map ■ Parking permits ■ Name tags and tent signs if using a panel of speakers 			
<p>Food/Refreshments</p>			
<p>Transportation (if needed)</p>			
<p>Budget/Finances</p>			
<p>Agendas/Program:</p> <ul style="list-style-type: none"> ■ Select and contact speakers and other resource people ■ Handouts, questionnaires, notebook information ■ Paper, pencils, pens 			
<p>Certificates/Awards (if necessary)</p>			
<p>Follow-Up:</p> <ul style="list-style-type: none"> ■ Evaluation(s) ■ Thank-you(s) 			
<p>Other Tasks (list):</p> <ul style="list-style-type: none"> ■ Parking ■ Exhibits ■ Door prizes ■ Speaker gifts 			

How to Facilitate an Effective Meeting

In addition to having a well-planned agenda and a well-setup meeting space, a leader's facilitation skills are also key to an effective meeting.

Leadership Roles within a Meeting

Group leader: The group leader (facilitator or chairperson) is responsible for preparing for the meeting, guiding meeting discussions, delegating work or finding volunteers for action steps, making sure the group is using effective processes for communication and to get work done, and following up after a meeting to be sure that members know their responsibilities.

The fundamental difference between a chairperson and a facilitator is the level or strength of direction provided in these roles. The chairperson, who is usually in a more formal role, makes rulings, determines procedures, rules people out of order, and so forth. The facilitator proposes, suggests, invites, and then consults with the participants to generate a consensus. The facilitator's "power" comes from the group; however, an effective chairperson will follow many of these same procedures (Kansas State 2004; Moore and Hamilton 1986).

Sharing Responsibilities with Co-Leaders

The facilitator's role is to make sure all essential tasks are done smoothly. Other members can support the group leader to facilitate the meeting. This modeling of teamwork can have very positive secondary effects on group process. Roles of other members at a meeting include:

- **Secretary or recorder:** The role of the secretary is to record the meeting notes while being a group member.
- **Time keeper:** The time keeper assists the group leader with the enforcement of time frames established for agenda items, in addition to performing as a regular group member role.
- **Monitor:** In the formative stages of group development, asking one group member to monitor the group process may be helpful. An evaluation form is helpful for this function/role.

Meeting Preparation Tasks (Pittrak and Hoopfer 1979)

Give all participants something to prepare for the meeting and the meeting will take on a new significance to each group member. For problem-solving meetings, have the group read the background information necessary to get down to business in the meeting. Ask each group member to think of one possible solution to the problem to get everyone thinking about the meeting topic. For example, to start a planning meeting on a positive note, have all participants recall the group's biggest success since the last meeting and ask one person to share his or her personal memory of that success with the group. For less formal meetings or brainstorming sessions, ask a trivia question related to the meeting objective. These tips will warm up the group and direct participants' attention to the meeting objectives.

Guiding Discussion for Effective Processes

As group leader, the facilitator will start the meeting, maintain clear discussions, help the group to reach decisions with minimal conflict, and close the meeting with action steps clear to all members. In this process, the facilitator should remain neutral and be aware of his or her potential to dominate the group. Therefore, the facilitator should avoid talking a lot, not argue with group members, and recognize each member's comments. Additional dominating behaviors to avoid include:

- Critiquing members' ideas.
- Making procedural decisions without group consent.
- Exploiting the facilitator role to propose or argue for positions.
- Providing lengthy comments.

Below is a list of process points that an effective facilitator will likely be concerned about when running a meeting, as well as ways he or she can handle each situation (Effective Meetings.com 2004; Kansas State 2004; Moore and Hamilton 1986):

1. Start the meeting.

- Call the meeting to order promptly.
- Introduce the members and guests.
- Review the agenda items and primary meeting objectives.
- Consider a team-building/getting-acquainted activity instead of formal introductions for less formal meetings.

2. Review common ground rules.

- Follow agenda time frame.
- No one talks too long or too often.
- Focus discussion on topics, not personalities.
- Stay on time and on topic.
- Share responsibility to accomplish tasks.

3. Keep the meeting focused on the topic and the agenda.

- Watch and acknowledge the timing.
- If needed, point out that the discussion has drifted and bring the group back to the main topic.

4. Clarify communication.

- Summarize lengthy contributions of participants or long discussions between multiple individuals with diverse opinions.
- Relate one participant's idea to another: "If I understand it correctly, your idea would add on to Tracy's by. . ."
- Request clarification on incomplete ideas: "Could you develop that idea a little more?"
- If a group member's contribution is cut off, invite him or her to complete it: "We may have cut Kelly off. Did you have more you wanted to contribute, Kelly?"

5. Accept feelings as valid data.

- Summarize feelings as well as content: "Your feeling is that. . ." or "You place great importance on. . ."
- See that ground rules are followed if discussion gets heated or emotional.

6. Restate problems or disagreements so that group members can work on a solution.

- State the problem to avoid sounding as though you are fixing blame or accusing someone. Reframe issues, if needed.
- Restate problems for clarification. Asking a question is often useful to clarify a specific problem.
- Help clarify the topic that needs a decision: "As I understand it, the Wilderness Act does not allow for development of recreation areas; however, it is open to us to recommend classification of this land."

7. Suggest a procedure or problem-solving approach.

- Point out when forming a subcommittee for further investigation of the topic may be helpful.
- Develop a visible way to make notes for later discussion.

8. At the end of each agenda item, summarize and clarify direction.

- Check to be sure that everyone who wanted to talk was able to contribute to the discussion.
- Summarize your understanding of what the discussion has accomplished and indicate what the action step is. A group member can also do this. Make sure the secretary also records the summary.
- When delegating tasks or accepting voluntary contributions on an agenda item, be sure the person taking the responsibility accepts it fully and is aware of the timeframe.

Additional Notes on Volunteers for Action Items (Pittrak and Hoopfer 1979)

Don't finish any discussion in the meeting without deciding how to act on the problem and who will be responsible for making sure the actions are taken. Listen for key comments that flag potential action items and don't let them pass by without addressing them during the meeting. Statements such as, "We should really. . .," "That's a topic for a different meeting. . .," or "I wonder if we could. . ." are examples of comments that should trigger action items to get a task done. Asking for volunteers for tasks as they arise during the meeting ensures that follow through will occur on items that group members deem important. Address off-topic statements by assigning them to future meetings or committees during the meeting to keep the meeting on track.

Conduct a feedback session during the last 10 minutes of the meeting, or ask the process monitor or other member to conduct one. Ask the following questions and elicit member feedback:

- Did we accomplish our objectives for the meeting?
- What worked well in this meeting?
- What remains to be done for the next agenda?
- Was any time wasted? If so, when and how?
- What can we do to improve our next meeting?
- How can we do our task better next time?

Every participant should briefly provide a point-form answer to these questions. Answers to the questions should be phrased positively in the form of a suggested impersonal action rather than personal criticism. For example, if a participant's answer is stated as, "Jim was too long winded," ask the participant to rephrase the comment as an action. The statement, "We should be more to the point when stating our opinions," is a more constructive suggestion. Remember, don't leave the meeting without assessing what took place and making a plan to improve the next meeting!

Finally, before leaving, schedule the next meeting time and place so that all participants can put it on their calendars. Request volunteers or assign agenda topics to specific members.

Follow-up from the Meeting

- Check with the secretary for clarity of minutes.
- Transfer leftover agenda items to the agenda for the next meeting.
- Distribute copies of the minutes and action items as soon as possible after the meeting.
- Send thank-you notes to guest speakers.

References

Effective Meetings.com. 2004. <http://www.effectivemeetings.com/>.

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Moore, Dan E., and Lee Hamilton. 1986. *Skills for Working Together*. University Park, Pa.: The Pennsylvania State University.

Pitrak, P., and L. Hoopfer. 1979. *Group Dynamite*. East Lansing: Michigan State University Cooperative Extension Service.

One of the most critical needs in Pennsylvania is strong local leadership for the future well-being of communities. This includes leadership for civic and nonprofit organizations, youth, the business community, elected officials, and citizens.

The *Learning Today, Leading Tomorrow* leadership curriculum was developed to help individuals develop and strengthen their personal leadership skills so they can play active and constructive leadership roles in their communities. The program focuses on developing and strengthening personal and interpersonal leadership skills, group and organizational leadership skills, and community leadership skills.

The curriculum is designed for use as a comprehensive, multiple-session leadership training program, taught by trained Penn State Cooperative Extension educators. Individual modules can also be used for stand-alone training within existing groups or organizations who want training on specific leadership or group process issues.

The entire *Learning Today, Leading Tomorrow* curriculum includes:

Unit I: Personal Leadership Skills

- 1: The Leader within You
- 2: Values and Ethics
- 3: Understanding Your Leadership Style

Unit II: Interpersonal Leadership Skills

- 1: Communications Basics
- 2: Facilitation
- 3: Managing Conflict

Unit III: Group/Organizational Leadership Skills

- 1: Productive Groups
- 2: Effective Meetings
- 3: Group Decisions

Unit IV: Community/Public Policy Leadership Skills

- 1: Dealing with Change
- 2: Public Issues
- 3: Understanding Pennsylvania Local Government
- 4: Active Leadership

For more information about the *Learning Today, Leading Tomorrow* program, contact your local Penn State Cooperative Extension office, or visit www.leadership.psu.edu.

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**LEARNING TODAY
LEADING TOMORROW**

DEVELOPING LEADERSHIP POTENTIAL