MEETING PLANNING TEMPLATE

Meeting Date	Meeting Time	Location/Room Requirements/ Tech Needs/Refreshments	Chairperson/ Notetaker

Meeting Purpose

- Why are we having this meeting? How is this contributing to our organization's key objectives? What would happen if we didn't meet? Is this meeting "mission critical"?

- What is the true cost of having this meeting? Are we being considerate of stress, time away from other tasks, meeting fatigue, seasonal demands, budget, and other priorities?

Meeting Outcomes

- What are 2-3 desired outcomes of the meeting? What will be the main indicator(s) of a successful meeting? Are there any items that need to be prioritized above all else?

- What decisions need to be made? What information needs to be communicated? What feedback do we need from participants?

Agenda Development

- Complete agenda template showing prioritized agenda items, type of item (information, discussion, decision), who will speak to the item, and time allocation.

- How and when will the agenda be shared prior to the meeting? Who will make this happen?

Attendance

- Who needs to attend the entire meeting (in light of our stated purpose and desired outcomes)?

- What guests need to be invited to speak to a particular agenda item?

- Are there any accommodations or unique needs/sensitivities to anticipate?

- Can participants attend remotely?

Information Sharing and Pre-Meeting Expectations

- How can we make our meeting more efficient and improve engagement and decision-making quality by sharing information before the meeting?

- What specific expectations do we have of participants in advance of the meeting?

- Who will take the lead in collating and distributing the information in a timely fashion?

Assignment of Pre-Meeting, In-Meeting, and Post-Meeting Responsibilities

- Who needs to do what in order to ensure that this plan is well-executed, meeting outcomes are achieved, and participants are engaged and see purpose and value in the meeting?

Meeting Evaluation

- How will we assess the quality of this meeting? How will we gather feedback that will enable us to improve the quality of future meetings?

- What did we learn from the assessment of our last meeting and the feedback we received?

ACHIEVE
CENTRE FOR LEADERSHIP

We believe that everyone should be able to like where they work.