

Meeting Preparation Checklist

This checklist is designed to help you intentionally prepare for a meeting with a team or group. It includes various questions to ponder as you strive to create an equitable, collaborative, and engaging meeting that achieves results. This checklist will help you plan the logistics while also considering the group's dynamics and overall goals.

This meeting checklist was adapted from *Great Meetings! Great Results: A Practical Guide for Facilitating Successful, Productive Meetings*. Learn more at <https://www.facilitatoru.com/data/guides/greatmeetingstext.pdf>

MEETING PURPOSE, DESIRED OUTCOMES AND TIMEFRAME

- What is the purpose of the meeting?
- What are the desired outcomes of the meeting? What tangible outcomes (e.g., lists, decisions) do you wish to have by the end of the meeting?
- Is this meeting part of a larger project or series of meetings? How does the goal of this meeting fit into the larger picture?
- Would it be helpful to talk with a wider group of people before planning the meeting? (Different group members may have differing views of the meeting's purpose and desired outcomes.)
- What is the timeframe within which the work needs to be accomplished?
- Are there notes or resources from previous meetings you can build off of for this meeting?

NATURE OF THE GROUP

- What is the make-up of the group? How many people will attend? What are their positions within the organization, school or community?
- What is the context within which this group works? Is it part of an organization, school, committee, etc.? How does that context impact this meeting and/or the group's dynamic?
- Who needs to be at the meeting or informed of the outcomes? Remember to include those who have special information and/or opinions to contribute, those whose approval may be needed in decision-making, those who are expected to carry out the decisions, and representation from those who may be impacted by the decisions.
- Are there any special characteristics of the group or its subgroups (e.g., new or visiting members, language preferences)? How will you ensure everyone has equitable access to the meeting space and information?

HISTORY AND CONTEXT

- What is the history of this group itself? Has it met before or is it newly formed? What has occurred that might affect how this group works together?
- What is the history of the situation leading to the meeting?
- Are there any underlying problems or external forces that might impact this meeting?
- Has the group had other facilitators? If so, how was that experience and what have you learned from it that you could apply here?

PLANNING

- How will you inform everyone of the meeting day and time?
- Where will the meeting take place? What supplies will you need for the meeting (e.g., paper and pens, sticky notes)?
- What is the agenda for the meeting? What topics will you discuss and for how long? (Tip: some people prefer to have the meeting goals and agenda ahead of time so they can prepare their thoughts.)
- What activities or engagement strategies will you use to foster discussion and hear from all voices in the room? (Tip: Some people prefer to write rather than speak, so consider collecting input in a couple of different ways.)
- Is the meeting in-person or virtual? How will you adapt the meeting accordingly?

ROLES

- Who will be the meeting facilitator?
- Will you or anyone else be playing dual roles (e.g., facilitator and leader, facilitator and participant, facilitator and expert)? If so, should those roles be shared with others?
- What background information will participants need prior to the meeting? Who will gather and distribute that information?
- What is the role of the group's leader in this meeting? Participant? Decision-maker?
- Who will be the note taker?
- Who is responsible for typing up and distributing the meeting notes?
- Who is responsible for setting up the logistics of the meeting (e.g., room reservation, equipment, refreshments, supplies, etc.)?

FOLLOW-UP AFTER THE MEETING

- What were the outcomes or takeaways from the meeting? Were there any action items or decisions made? Who will be responsible for each of the action items?
- How will you ensure follow-up on the ideas and outcomes from the meeting?

