Effective Meeting Checklist

Dana Center **Mathematics** PATHWAYS

Purpose: This tool lists key tasks and considerations when planning for effective meetings.

Users: Facilitator and co-chairs ("executive committee") or institutional leadership team

Instructions: Use the checklist to help 1) create the agenda, and 2) conduct the meeting.

Creating the agenda

Plan the opening

- ☐ Summarize the previous meeting.
- ☐ Review action items or "homework" from the previous meeting.
    - Discuss assigned readings or tasks.
    - Complete objectives that were not fully met.

Plan meeting outcomes

- ☐ Identify outcomes for the meeting and plan activities to achieve outcomes.
    - Ensure each activity has a clear purpose.
    - Allow for both small and large group discussions.
    - Find ways to invite input from all members.
- ☐ Consider if advance information or preparation would help achieve outcomes.

Plan for the conclusion

- ☐ Summarize meeting outcomes.
- ☐ Identify work that needs to be done after the meeting such as tasks for small working groups; reading assignments; disseminating information to colleagues, etc.

Conducting the meeting

Prior to the meeting

- ☐ Send the agenda, including meeting outcomes, along with reminders of assignments or tasks; include any information that members need to prepare for the meeting.
- ☐ Prepare any materials needed for the meeting.

During the meeting

- ☐ Monitor time for each agenda item.
- ☐ Consider if is there a need to follow up with any members who are not present.
- ☐ Check that meeting outcomes have been met. If not, plan follow-up.

After the meeting

- ☐ Send minutes to all members with reminders of any new assignments or tasks.
- ☐ Follow up with members not present, as needed.