Effective Meeting Checklist



Purpose: This tool lists key tasks and considerations when planning for effective meetings. **Users:** Facilitator and co-chairs **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. o Complete objectives that were not fully met. Plan meeting outcomes ☐ Identify outcomes for the meeting and plan activities to achieve outcomes. o Ensure each activity has a clear purpose. • Allow for both small and large group discussions. o 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.