Effective Meeting Checklist

**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.