

Meeting Planning Worksheet

'Successful meetings are the result of careful planning and adept facilitation'.

-Shirlene Warnock and Jeanne Nyquist

Please use this worksheet as a planning tool to help you prepare for a successful, worthwhile meeting.

Meeting Title:	
Date / Time:	Logistics: <i>Room Set, Materials, AV, Refreshments</i>
Location:	
Facilitator:	

Meeting Planning Considerations	Meeting Planning Notes
Purpose <ul style="list-style-type: none"> ▪ <i>Is the meeting necessary?</i> ▪ <i>What are the objectives?</i> ▪ <i>What are the desired outcomes?</i> ▪ <i>What do we want to accomplish?</i> ▪ <i>What type of conversation is this?</i> 	
People <ul style="list-style-type: none"> ▪ <i>Who will be involved?</i> ▪ <i>What are the group dynamics?</i> ▪ <i>What are the potential conflicts?</i> ▪ <i>What group norms need to be established?</i> 	
Process <ul style="list-style-type: none"> ▪ <i>What content will be discussed?</i> ▪ <i>What level of empowerment does the group have?</i> ▪ <i>If a decision is to be made, what decision making process is best?</i> ▪ <i>What roles will people play during the meeting?</i> ▪ <i>What facilitation processes will best support the group?</i> 	
Plan of Action <ul style="list-style-type: none"> ▪ <i>How will group decisions be clarified and recorded?</i> ▪ <i>How will a plan of action be developed?</i> ▪ <i>How will follow-up occur to ensure that action is taken?</i> 	

Agenda Template

Meeting Title: _____

Logistics

- Date:
- Location:
- Time:
- Facilitator or Convener:

Type of meeting (check all that apply):

- Information Sharing
- Planning
- Solving Problems
- Building Relationships

Purpose and Objectives:

Agenda Items:

Time	Agenda Item: <i>(topic and brief description)</i>	Person <i>(leading discussion)</i>	Process Tool?
	1. Welcome and Introductions		
	2. Item		
	3. Item		
	4. Item		
	5. Wrap up and Next Steps		