Meeting Organization Checklist

RATIONALE:

This worksheet is designed to help you organize and plan a meeting.

INSTRUCTIONS:

Review this checklist when you first start thinking about planning a meeting, using the "Timeline" column to help you figure out when to do each task. As you work through the tasks, check them off as complete.

You can use the "Notes" section below the checklist to keep track of your ideas for the meeting and any other information you may want to have on hand (e.g., contact info for people attending, catering information, etc.).

Timeline	Task	Complete?
2-3 weeks in advance	1. Identify your purpose/goals for the meeting. Why are you organizing this meeting? What do you hope to have achieved by the time it's over?	
	2. Figure out who you're going to invite. Who needs to be there?	
	3. Organize the logistics: date, venue, time, catering, childcare, transportation, etc.	
	4. Send out invitations (via email, over the phone, in person).	
A few days - 1 week in advance	5. Create an agenda that outlines your plan for the day of. What will you be doing, when?	
	6. Confirm the logistics (see Task 3).	
	7. Remind participants and confirm attendance (via email, over the phone, in person). Circulate the agenda to invitees so people know how to prepare for the meeting.	
Day before/ day of	8. Print and prepare any materials you will need (e.g., worksheets, pens, paper, projector, etc.)	
	9. Arrive early to set up and arrange the room, set up equipment, etc.	
	10. Arrange to take notes yourself or delegate this responsibility to someone so you can focus on facilitating the meeting. Capture key discussion points and follow up action items.	

Notes:

ESTABLISH A PROGRAM ADVISORY COMMITTEE

Program design is all about answering the big questions. Examples include:

- *What will the program focus on?*

- *Who will organize and administer the program?*

- *Who will be in charge of securing funding and developing key partnerships?*

- *Who will hire a program coordinator to run the program on a day-to-day basis?*

- *What skills will the coordinator position require?*

While it's possible that the responsibility for making these decisions will all fall on one person, it can be helpful to set up a program advisory committee to support the coordinator. This committee should include people who have a role to play in either program vision, design, implementation or ongoing management, and who are committed to meeting regularly (e.g., once a month, once a term, twice a year, etc.) to guide program planning, review, and on-going decision making.

If setting up a program advisory committee makes sense for your community, start by organizing a program planning meeting with a small group of people who have already shown an interest in your program's potential and who will be important to have on board to help get it off the ground. If you followed the steps outlined in **Chapter 2**, you should
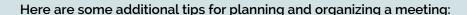

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If you completed the Resources and Assets Worksheet (Tool 2B), you will already have created a list of program champions. Refer back to it now as you think through who to bring together to design your SEAS program.

already know who these people are–they are your **program champions**. You can use this first meeting to make some key decisions about the program, such as what it will focus on and how it will be organized and structured for delivery.

If you're not sure how to go about organizing a meeting like this, use the **Meeting Organization Checklist** (Tool 3A) to help you work out the logistics.

TOOL 3A:
Meeting
Organization
Checklist

Here are some additional tips for planning and organizing a meeting:

- *If there are key people who need to be at the meeting, check with them about their availability before picking a date or sending out invitations.*

- *Be sure to mention the purpose of the meeting in your invitation so that your invitees know what it's about.*

- *Tailor your invitations to the individual. For example, some people don't use email that frequently. It may be best to call them up on the phone or visit them in person.*

- *Help people participate by offering rides, childcare, food, etc.*

- *Remember two critical follow-up details: (1) provide a summary of people's feedback and any other outcomes from the meeting, and, (2) say thank you to everyone who helped and who participated.*

- *Don't forget to follow up with invitees a couple of days before your meeting to confirm their attendance.*