

Organizing, Planning and Facilitating a Meeting

Sample Checklist

Meetings are a necessary part of social action. They provide opportunities to identify goals and encourage involvement. Well-planned meetings can create successful events and attract others to your cause. The following checklist will help you to plan effective meetings.

Planning Our meeting is well-planned.

- Meeting has clear goals and objectives.
(A goal is a general statement of direction – e.g. ending poverty in our community. An objective is a specific and measurable action step to accomplish the goal.)
- Agenda is provided.
 - Everyone receives a printed agenda.
 - Agenda items are connected to the goals and objectives.
 - Agenda items have time limits if necessary.
 - Reminders are sent about the meeting time and location.
 - Small groups brainstorm specific solutions.
 - The large group selects from options and makes recommendations.
 - Leaders choose a convenient time for the group to meet.
 - Leaders choose a workable space.
 - A facilitator is selected to run the meeting.

Room Set-Up

- Set-Up depends on goals...
 - Informal discussion – chairs are set up in circles and around tables.
 - Informational meeting – classroom set-up.
 - Refreshment table is set up opposite the entrance.
 - Sign-in Sheet / Name Tags near the entrance.

Roles and Responsibilities

- We assigned as many roles as possible. Everyone has a job.
 - Leader / Facilitator
 - Record Keeper
 - Greeter / Welcomer
 - Timer
 - Committee Representative
- Everyone leaves the meeting with something to do for the next time.

Materials

- Agenda is printed.
- Materials / handouts are provided.

Running the Meeting

- Meeting starts on time.
- People are welcomed and introduced.
- Facilitator(s) stick to the agenda.
- Meeting plans for action and is always action oriented.
- Everyone is involved.
- Everyone commits to something by the end of the meeting.
- Commitments and next steps are reviewed before the meeting ends.
- Meeting ends on time or before.

After the Meeting

- Follow-up provided for all members.
- Reminders are sent to all regarding next steps.