

Meeting Planner Worksheet

Objective(s)

- What should be achieved by the end of the meeting?

Background Information

- Information already known
- Information needed
- Limitations:
 - Deadlines
 - Constraints
 - Resources Available

Meeting Participants

- Who would expect to be involved?
- Who needs information?
- Who can contribute?
- Who would provide support?

Agenda Planning

- Topics/issues to cover
- Time allotted for each agenda item
- Start/end time
- Meeting location/date
- Assign note taking

Participant Preparation

- Agenda sent to participants prior to meeting?
- Any pre-work required?

Meeting Planning Checklist

Meeting objective: _____

Date: _____

Time: ____ to ____ a.m./p.m.

Place: _____

Participants _____

Room reserved: _____

Agenda (meeting notice)

____ Prepared

____ Sent

Meeting Materials

____ Notepads, pencils

____ Name/place cards

____ Name badges

____ Handouts _____

Equipment

____ Overhead projector

____ Spare lamp

____ Slide projector

____ Spare lamp

____ Proxima

____ Spare lamp

____ Screen (Size)

____ Charts

____ Pointer

____ Chalkboard

____ Chalk

____ Videotape

____ TV/VCR

____ Marking pens

____ Microphone

____ Lectern

____ Extension cord

Room Layout

Food, Beverage

____ Coffee

____ Juice

____ Soft drinks

____ Lunch

Post meeting

____ Action Minutes

____ Next meeting _____

Note: Designate No Smoking Area

Agenda

MEETING TITLE/PURPOSE: _____

MEETING OBJECTIVE(S):

<p>LOGISTICS:</p> <p>DATE:</p> <p>TIME:</p> <p>LOCATION:</p> <p>BRING (MATERIALS):</p> <p>PREPARATION REQUIRED:</p>	<p>GROUP MEMBERS:</p> <ol style="list-style-type: none"> 1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____ 7. _____ 8. _____ <p>Meeting Called By: _____</p> <p>Telephone: _____</p>		
<i>Agenda Item</i>	<i>Format</i>	<i>Time</i>	<i>Person(s) Responsible</i>

Meeting Notification

To: _____

From: _____

Date: _____

Date: _____

Time: Start: _____ End: _____

Location: _____

Agenda

Item	Time	Person(s) Responsible
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Meeting Objective: _____

Pre-meeting preparation: _____

Meeting Action Plan

Meeting: _____

Meeting date: _____

Recorder: _____

Chair: _____

<i>Action to be Taken</i>	<i>Person Responsible</i>	<i>Deadline</i>	<i>Completed</i>

Key issues or discussion _____

List of attendees attached

Time end: _____

Start: _____

Next meeting: _____ Length: _____

Meeting Evaluation Form

- **Our meeting today was:**
Focused 1 2 3 4 Rambling
- **The pace was:**
Too fast Just right Too slow
- **Everyone got a chance to participate:**
Yes Somewhat No
- **Our purpose was:**
Clear 1 2 3 4 Confused
- **We made good progress on our plan:**
Yes Somewhat No
- **We followed our ground rules:**
Yes Somewhat No

Additional Comments:

Meeting Minutes Worksheet

Agenda Item	Key Discussion Points Main Points	Outcomes Decisions, Action Items