Effective Meeting Checklist

Before the Meeting

- Define the goals of the meeting. Make sure it’s realistic.
- Make sure the goal can be accomplished in one meeting.
- Develop a list of questions and problems to start group discussion.
- Prepare the following in advance:
  - Facilities (For example: seating, audio visual equipment, lighting, temperature, etc.)
  - List of participants (keep numbers in line with meeting purpose)
  - Refreshments, childcare, transportation, parking
  - Agenda with time frames, presenters identified and prepped

Conducting a Meeting

- Start on time.
- Group members should introduce themselves.
- Discuss “housekeeping” items. (For example: breaks, restroom location, refreshments, etc.) and group agreements around participation
- Follow the agenda to accomplish the desired purpose.
- Make sure everyone participates.
- Stimulate, guide, and facilitate discussion.
- Strive to achieve consensus (at best), or majority decisions (at worst).
- Accurately capture comments, record on big paper

Before You Adjourn:

- Firm up decisions.
- Make assignments for pending work items with timeline
- Set up next meeting times, dates, and purpose, if needed.

Follow-up

- Have action items, tasks, people, and times clearly identified.
- Prepare report/minutes of the meeting.
- Periodically evaluate the effectiveness of the meeting.
- Decide how subsequent meetings can be improved.
- Leader should periodically check on progress of work items.
Key Items for Effective Meetings

♦ Prepare agenda
♦ Have specific goals and objectives
♦ Roles (leader, facilitator, recorder) are recognized and accepted by all participants
♦ Emphasis of a meeting should be on getting the job done rather than on who controls the meeting
♦ Maintain an informal, relaxed atmosphere
♦ Stay with agenda times and items
♦ Encourage all meeting attendees to participate
♦ Everyone understands and accepts the agenda and goals for the meeting
♦ Brainstorming is encouraged; i.e., all suggestions are visibly written, no suggestion is right or wrong.
♦ Everyone’s ideas should be heard; encourage sharing of ideas
♦ If possible, agreements are reached by consensus. If consensus is not possible, a majority decision is desirable
♦ Criticism is frank and constructive without personal attacks.