

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

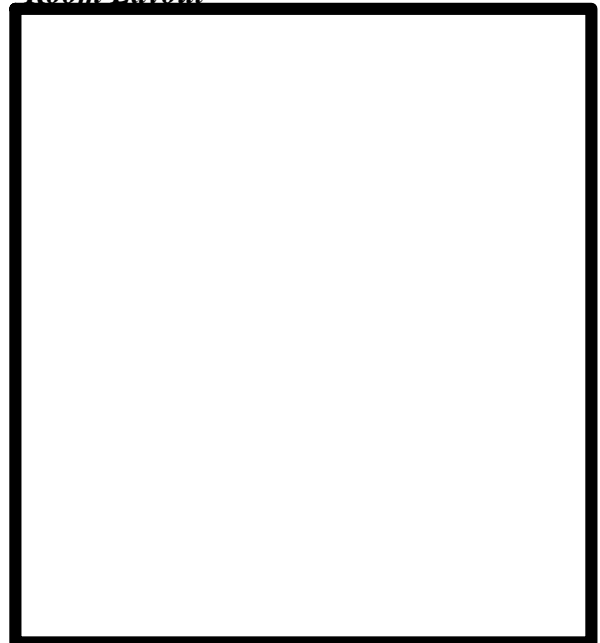
___ Marking pens

___ 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):

1. _____

2. _____

3. _____

4. _____

<p>LOGISTICS:</p> <p>DATE: _____</p> <p>TIME: _____</p> <p>LOCATION: _____</p> <p>BRING (MATERIALS): _____</p> <p>PREPARATION REQUIRED: _____</p>	<p>GROUP MEMBERS:</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>4. _____</p> <p>5. _____</p> <p>6. _____</p> <p>7. _____</p> <p>8. _____</p> <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

<i>Item</i>	<i>Time</i>	<i>Person(s) Responsible</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

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