10-POINT MEETING CHECKLIST

1. Involve participants early:
☑ People who are included in a project from its beginning tend to have a greater investment in its success.

2. Agree on a shared purpose:
☑ Spend the few minutes it takes to get everyone to collaboratively agree on desired outcomes.

3. Fit the agenda to the purpose:
☑ View your agenda as dynamic rather than static; revise by consensus to meet the needs of the group.

4. Record ideas, issues, and agreements:
☑ The medium is unimportant (flipchart, laptop, notes), as long as the salient points are captured and quickly disseminated.

5. Establish ground rules:
☑ Defining ground rules is not optional but necessary. They may need to be customized to meet particular meeting needs. Don't feel they can't be revisited.

6. Manage tasks and teamwork at the same time:
☑ If there are process issues that arise (interrupting, side bars, lack of participation), agree to place the agenda on hold until the process is back on track.

7. Answer four key questions for every agenda topic:
☑ what is the specific issue to be discussed?
☑ What result(s) do we want from our discussion?
☑ What process will we use to frame our discussion?
☑ How much time do we want to spend on it?

8. Decide on next steps as a group:
☑ Collaboratively decide on action items for the next meeting, including volunteers (or next rotation) for roles and tasks.

9. Evaluate the meeting:
☑ Take a few moments to capture members' reaction to the meeting using any number of formal or informal possible methods.

10. Follow up:
☑ Commitments made during meetings must be met <u>between</u> meetings. Establish a method for benchmarking progress.

Based on an article by Robert Levasseur in "Successful Meetings"