# Critical Elements of Meeting Design

**Instructions:** Use this checklist as a starting point for items to consider. Customize this document, adding relevant information as appropriate or removing information that does not apply to your situation.

## Objective

| Check Box | Questions to Consider |
| --- | --- |
|  | What is the purpose of the meeting? |
|  | What will be accomplished? |

## Logistics

| Check Box | Questions to Consider |
| --- | --- |
|  | Where will the meeting take place? |
|  | How long will the meeting last? |
|  | Is there adequate advance notice? |
|  | Does the meeting start and end on time to value everyone’s viewpoint? |
|  | Does a recorder capture and transcribe key decisions, action plans, and a meeting summary? |

## Agenda

| Check Box | Questions to Consider |
| --- | --- |
|  | Is adequate detail provided to set expectations and help members prepare? |
|  | Is the agenda used to keep meetings on track? |
|  | Is the agenda followed closely during the meeting? |

## Participants

| Check Box | Questions to Consider |
| --- | --- |
|  | Are the right participants invited? |
|  | Is the reason for each participant’s attendance clear (e.g., a point of view, a need to know, the authority to make a decision, or useful information that will shape the topic and drive closure)? |
|  | Do you build upon each other’s ideas during the meeting? |
|  | Do you listen attentively and respectfully to one another and hold one conversation at a time? |
|  | Are all opinions valued? |

## Ground Rules

| Check Box | Questions to Consider |
| --- | --- |
|  | Do you refrain from recapping what the team has covered if someone comes late to the meeting? |
|  | Do you offer to discuss the work of the team “offline” (i.e., after the meeting is over) if an important member comes in late? |
|  | Do you request notes/reports ahead of time from habitual latecomers so you may review their work without their presence at the meeting? |
|  | How will members handle phone calls and pages (e.g., agree to turn devices to mute? Step outside the room for calls that must be answered immediately)? |

## Meeting Facilitation

| Check Box | Questions to Consider |
| --- | --- |
|  | Are introductions made? |
|  | Is the purpose of the meeting reviewed? |
|  | Are roles and responsibilities reviewed (e.g., timekeeper, recorder, and facilitator)? |
|  | Is the meeting agenda reviewed? |
|  | Are group norms and ground rules established? |
|  | Are all agenda items discussed? |