

# Planning Meaningful Meetings

Meetings can be wonderful opportunities to connect, accomplish goals, and get inspired. They can also be stressful, time-consuming, and frustrating if not done well. Here are some things to think about as you develop your own “meeting” checklist.

## Pre-planning

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- **What is the point of the meeting? What do you want to accomplish that can't be accomplished over email? Will it be virtual or in-person?**
- **Who should be at the meeting?** If you are asking questions about grant funding, a Community Health Worker might not have the answers. If you are asking about current on the ground challenges, an administrator might not know off-hand.
- **What are you able to offer at the meeting?** Be transparent if there will be coffee, snacks, or a meal.
- **Is this going to be a series of ongoing meetings or a one-off meeting?**
- **How far out do you need to invite people to the meeting?** If you have to secure a space, have you done that yet?
- **Should people confirm they are attending the meeting? When is the deadline, if so?**

## Leading up to the meeting

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- **How many emails will you send out informing potential attendees about the meeting?** Prepare and schedule emails in advance if helpful.
- **What accommodations do people need?** Be clear about any notice you need to provide services like ASL or language interpretation. Make sure you've also communicated any important accessibility information if meeting in a physical space.
- **What information is important to share in advance?** Perhaps there is free parking or a certain entrance to use or a person to ask for. Let attendees know.
- **What materials do you need to have ready for the meeting?** Provide any presentations electronically in advance for people who may need more processing time or use a screen reader. You can also save paper and create a takeaway document with key points rather than printing a slide deck.

## During the meeting

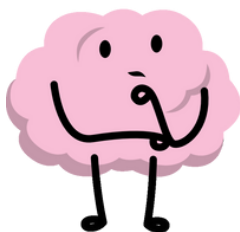
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- **For meetings in person, consider how you set up the room and organize any tables or chairs.** Can people move around easily as needed, including people who use wheelchairs or walking aids?
- **Make sure there is a clear agenda so people know what to expect and when.** Let people know how long different sections will take, when breaks will happen, and any other important agenda items.
- **Help create a connection between attendees.** How will you create either formal or informal opportunities for people to connect with and learn from each other?
- **Be prepared for things to go wrong.** No matter how hard we plan, things can still go sideways. Take a deep breath, let people know what's going on, and keep things moving if possible. Be kind to yourself and others.

## After the meeting

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- **Follow up with attendees.** This could include action items, next steps, follow-up information, and notes about what was covered. Try to send information within a few days so that all the information is still fresh.
- **Identify what went well.** Pay attention to what people enjoyed about the experience!
- **Reflect on what you will do different next time.** Were there more people than you expected? Was there not enough coffee? Maybe people were very quiet and didn't contribute to the conversation? Don't be afraid to dig in and think about what you would do differently next time.



Think about a time you went to a meeting that didn't go as planned OR a meeting that went great. What did you learn from either experience that stayed with you?

Any other tips you'd add to the lists above?