



## Planning for a Success Team Meeting

# Success Team Meeting Planning Checklist

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This checklist guides the careful and intentional planning of team meetings.

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### Before Event

- Identify/confirm meeting date, time, and location
- Develop agenda (best to plan at least 5 days in advance)
- Secure team members to serve in meeting roles, including:
  - Recorder (make sure the recorder has an electronic copy of agenda to type minutes directly into the agenda during the meeting)
  - Timekeeper
  - Parking lot attendant (someone who records issues that are important but not directly applicable to the meeting agenda)
  - Process observer
- Email meeting reminder at least 48 hours prior, including: date, time, location, and materials to bring (if appropriate)
- Create and compile all necessary materials, including:
  - Attendance sheet
  - Payroll sign-in sheet (when applicable)
  - Agenda
  - Point-in-time academic and attendance data
  - Point-in-time intervention tracking data
  - Materials for intervention implementation
  - Materials for celebratory activities
- Gather supplies and equipment needed for facilitation, including:
  - Chart paper, markers, highlighters, extra pens
  - Post-its and tape
  - Audio-visual equipment (as appropriate)
- Email agenda at least 24 hours prior to the meeting, including reminder to bring necessary materials
- Arrive early to set up meeting space
  - Seating so that all members can see each other
  - Chart paper posted where all members can see it
  - Attendance, agenda, and payroll sign-in sheets at room entrance (to prevent distraction by latecomers)
  - Extra pens around the seating area

### After Event

- Collect your supplies for safekeeping for the next meeting!
- Submit sign-in sheets to main office
- Archive a copy of the agenda and minutes
- Email the meeting minutes to team members within 48 hours or sooner if there are action items with immediate due dates