

Effective Family Meeting Worksheets

Worksheet A: Planning Outline

Family Name/s			
Why meet? (Objective/s for an upcoming family meeting)			
1.			
2.			
3.			
What do we want to cover at the meeting?			
<u>Agenda Item</u>	<u>Informational</u>	<u>Discussion</u>	<u>Decision</u>
Who needs to be included? (Persons to invite)		What are their roles?	
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
When can we meet and for how long? Where can we meet?			
<u>Meeting Date</u>	<u>Meeting Times</u>	<u>Location</u>	
How can we create a safe and productive meeting space? (Ground rules/meeting agreements)			
<u>Problem</u>	<u>Agreement</u>		
1.			
2.			
3.			
4.			
5.			
6.			

Worksheet B: Agenda Format

Meeting date & time:

Location:

Facilitator/s:

Agenda planner/s:

PROPOSED AGENDA

	Minutes	Start time	Lead person/s	Notes <i>Activity? Expected outcome?</i>
Opening & Objectives for the meeting				<i>Review objectives, agenda, & meeting agreements.</i>
Item A: <hr/> <i>(light)</i>				<i>Informational? Discussion? Decision?</i>
Item B: <hr/> <i>(medium-heavy)</i>				<i>Informational? Discussion? Decision?</i>
Break / meal				<i>*Take breaks every 90 minutes.</i>
Item C: <hr/> <i>(medium-light)</i>				<i>Informational? Discussion? Decision?</i>
Review action items				<i>Define & record all action items. Define next meeting and roles.</i>
Close				<i>Can include appreciations/family rituals.</i>

NEXT MEETING

Date & time:

Location:

Facilitator/s:

Agenda planner/s:

Other roles:

Worksheet C: Proposal Format

Proposal title		
Action requested		
Lead person/s		
Scheduled for discussion		
Scheduled for decision		
Summary		
Background		
Rationale		
Opportunities to generate resources	Resources needs	
Action items to follow		
Possible benefits	Potential difficulties	Alternatives