**Pre–Meeting Checklist**

**Overview**

In getting ramped up for your meeting please review and respond to the following requirements. By completing as much of this form as possible you will help to optimize our discussion together and ensure a more complete and efficiently designed product.

1. What are the **outcomes** I expect will be achieved as a result of this meeting? (please identify tangible and intangible results):

a.

b.

c.

d.

1. The **overall purpose** for my meeting is to:
2. General knowledge questions:
   1. What do you mean by *indicators*?
   2. What will make any given universal common or universal?
3. Is there any decision-making that needs to be made during the meeting? For what purpose?
4. Meeting Logistics:
   1. The entire meeting is to be no longer than: \_\_\_\_ min./hrs.
   2. To occur in the \_ a.m. \_ p.m.
   3. Location for meeting will be at:
   4. The room has these features/constraints (size, AV, lighting, etc.):
   5. Contact person regarding meeting logistics is: email: phone:
5. The participants:
   1. The number of people attending:
   2. What level(s) within the organization?
   3. To what extent do the participants know one another?
   4. Have they worked collaboratively before?
      1. Doing what? When?
6. Re: Agenda Topics
   1. I have an agenda already prepared: \_ yes, \_ no, \_ partially
   2. These are the topics that are non-negotiable (i.e. must happen):
   3. Any other expectations do you have for your agenda? (i.e. degree of participation, decision making process, tools, etc.)
   4. Is there time for a warm-up or energizer with the group? What are you thinking of?
   5. Who needs to be involved in ratifying the meeting designs for each day?
7. Content Preparation:
   1. What pre-reading materials are people expected to review before the meeting?
   2. What specific presentations need to be made during the meeting?
   3. What assumptions around content or topic knowledge do you have with regards to the participants?
   4. What resource people or subject matter experts do I need to invite?
8. Communications:
   1. What communications have been sent out to date re: this meeting?
   2. Can the facilitator be part of scripting the communication or, at least, be able to review all communications to ensure consistency between what is being said and your outcomes?
9. How do you plan to end the meeting?
   1. Who will be transcribing all of the flipcharted information?
   2. What do you see as next steps following this meeting?
   3. What will happen with the resulting information?
10. What are any possible challenges with people or the process that you might expect to occur?