



Before the Meeting

- Design the meeting goals
- Decide upon a date, time and location for the meeting
- Reserve meeting space
- Create an outreach plan
- Develop the draft agenda for the meeting with time breakdowns

Agenda Example:

Goals:

- *To update local affiliates and receive their feedback on the national campaign plans*
- *To set a date and plan for the NY local organizing around the national campaign*

I. *Welcome and Introductions - 10:30 – 11:00*
a. *Member Updates*

II. *Agenda Review - 11:00 – 11:10*

III. *Meeting Agreements – 11:10 – 11:20*

IV. *National Work Updates - 11:20 – 12:00*
a. *Research*
b. *California Bill of Rights Campaign*
c. *Capacity Building Program*

Lunch 12:00 – 12:30

V. *National Campaign Discussion - 12:30 – 2:00*
a. *Caring Across Generations Campaign Review [20]*
b. *Campaign Update [10]*
c. *Feedback on Policy Proposals [30]*
d. *Local Organizing [30]*
i. *Setting local Care Congress Goals*
ii. *Develop Organizing Plans*

VI. *Announcements and Closing - 2:00 – 2:30*
a. *Evaluation – what was most useful in the meeting, and what could be improved for next time*



Reference: Steps to Organizing a Meeting

- Review the draft agenda with your supervisor, make improvements
- Assign parts of the agenda to the appropriate leaders and work with them until they feel prepared.
- Conduct follow-up calls to confirm who will be present at the meeting
- Prepare all the materials for the meeting
- Day of: Send out a reminder via text about the meeting

The Week of the Meeting

- Photocopy materials
- Order the food
- Pick up any equipment needed (interpretation, mics, etc.)
- Review the agenda with the staff at the staff meeting, make sure to get feedback from the staff about the announcements to make
- Prepare your sections of the agenda, make sure you know what you're going to say and how you want to facilitate the your section
- Create a sign-in sheet for the meeting and print it out

The Day of the Meeting

- Arrive to the office at least one hour before the meeting is supposed to begin to set up.
Set up includes:
 - Preparing enough materials for all meeting participants in all the languages you need
 - Setting up a projector (or arranging for someone else to do this in time)
 - Writing up butcher paper
 - Putting enough chairs in the room
 - Call the restaurant to confirm the lunch order and remind them of the time you need the food
 - Printing out some sign in sheets
- As people arrive, make sure they are welcomed and know one another, ask them to sign in
- If they are looking uncomfortable, talk with them or ask for their help with something to involve them
- Make sure the food is ordered on time
- Wait or make sure someone is waiting to receive the food
- Set up the food when it arrives or ask someone else to
- During the meeting:
 - Assign a notetaker to take notes on who was present, key decisions, next steps and follow-up needed (you will need to report on what happened to the rest of staff and your supervisor)



Reference: Steps to Organizing a Meeting

- Make sure there is a concrete next step, either another meeting, or a specific action to take
- After the meeting is over:
 - Make sure there is good clean up, especially of the food
 - Put chairs back if needed
 - Take down butcher paper
 - Put the sign in sheet, a copy of the agenda and a copy of the notes from the meeting in a file so you can easily go back and find it

Follow-up steps

- Identify the next steps from the meeting, what people are waiting for, and what you need to do next, put it into your staff workplan
- Send out notes from the meeting to the participants and reminders of responsibilities they have to follow-up on and thank everyone for coming