

A Checklist

Use these practical, field-tested structures to help your team build trust and maximize planning time!

Before the meeting

- Pick a **facilitator**.
- Assign a timekeeper and recorder (separate people, if possible). Decide on a common protocol for these roles to use. Rotate roles over time to build strengths/ownership in team members.
- Assign someone to book and set up the meeting room, set up and test technology, and bring snacks. These can be part of one of the above roles or distributed to one or more participants. Find a comfortable and quiet space to limit interruptions and allow for candid conversation.
- Prepare an **agenda**, complete with timing expectations (e.g., 10 minutes) for each topic as well as clear expectations for how team members should prepare.
- Post agenda for team to view at least 24 hours in advance and allow time for comment/tweaks.
- Prepare visuals to aid discussion (e.g., student work, websites, data charts, textbooks) in a format that everyone can see (e.g., projector, individual laptops, posters, printed copies).

During the meeting

- Start and end meeting on schedule.
- If you haven't already, establish **norms** for your meetings. Post them in your meeting space and revisit/adjust them as needed throughout year.
- Open with a few moments of positivity—celebrations/personal updates/fun announcements.
- Follow agenda. If topics arise that are not on agenda and can wait, add them to the notes to be discussed at a future meeting, and keep moving.
- Ensure everyone participates in the discussion/votes on decisions. Record votes in minutes.
- Ensure conversation is balanced so that no one person dominates.
- Ensure the facilitator frames each decision point before asking for discussion or calling a vote.
- Leave a few minutes at the end for the facilitator to recap decisions and next steps.
- Ensure recorder includes “who, what, and by when” when noting next steps.

After the meeting

- Circulate/post draft notes within 24 hours of meeting for team to view. Set a deadline to accept any adjustments to the notes prior to the next meeting.
- Post the final notes in a place all team members can access as needed (e.g., shared drive)