

Meeting Planner

Planning each Keystone meeting in advance is important, because a well-planned and organized meeting will hold everyone's interest and keep the team on track. This checklist helps you plan the details so your Keystone meeting will be focused and productive.

Instructions

- Keystone advisor and officers (planning team) should plan each Keystone meeting in advance.
- If your Club has not elected officers, the advisor should partner with one or two Keystoners to plan.
- Planning should be done at least one day before the meeting. Allow at least one hour for planning.
- Use this checklist to plan all items included the meeting. Make notes at the end if you need to.
- Have the **Meeting Agenda** resource in front of you, and transfer the details to that form.
- If you're responsible for an agenda item, download the resource and read it in advance.
- Print the planner and bring it with you to the meeting so you can refer to your notes.
- Review the **Guidelines for Facilitating Meetings** resource for tips to lead the meeting.

Prepare for your Keystone meeting	
1.	Date and time to meet <input type="checkbox"/> Confirm the date and time
2.	Meeting place <input type="checkbox"/> Confirm the location <input type="checkbox"/> Set up the room <input type="checkbox"/> Gather any materials needed for the meeting
3.	Meeting roles Identify who will be in the following meeting roles: <input type="checkbox"/> Facilitator—reviews group agreements, leads the team through the agenda and guides discussion <input type="checkbox"/> Co-facilitator—assists the facilitator and shares responsibility for agenda and discussion <input type="checkbox"/> Note-taker—takes notes at meetings (Guidelines for Taking Notes) <input type="checkbox"/> Community builder leader—prepares and leads the team in the community builder activity <input type="checkbox"/> Reflection/recognition leader—prepares and leads reflection and recognition part of the meeting

Plan the Keystone meeting agenda

1. Warm welcome

- Think about each teammate and how you want to greet them by name.
(For example: “Hi Grant, good to see you. Let’s talk after the meeting about plans for Friday.”)

2. Community builder

- Choose a community builder (use your own or one from the **Community Builders** resource)

3. Group agreements

- Post group agreements in meeting room
- Plan to revisit group agreements during meeting

4. Meeting introduction

- Decide how to introduce the team to the focus/discussion topic
(For example: “Today we’ll be brainstorming to come up with ideas for possible projects.”)

5. Focus/discussion topic

(select one or more topics from the list below; some discussions will take place over several meetings)

Recruitment: Grow your Keystone family

- Recruitment (**Agenda: Recruitment Meeting**)

Orientation: Welcome new members

- Orientation (**Agenda: Orientation Meeting**)

Preparation: Conduct your first meeting

- First meeting (**Agenda: First Meeting; What Sparks Your Passion? Community Builder**)

Roles: Identify leadership roles

- Leadership roles (**Leadership Roles**)
- Elect officers (**Guidelines for Electing Officers**)

The Charter Year: Plan for your Keystone Club year

- Goals for your charter year (**Chartering Your Club**)
- Plan and calendar for the year (**Yearly Planning Calendar**)
- Budget for the year (**Budget Planner**)
- Fundraising strategies (**Fundraising Guidelines and Planner**)

Reflection: Evaluate your Team’s Progress

- End-of-year reflection (**Reflect on Your Keystone Experience**)

Project Work: Design and Plan a Project

(Keystone National Project/projects in four key focus areas)

- Passion + Problem = Project process (**Passion + Problem = Project Planner**)

- Plan for action (**Project Action Plan**)
- More about identified needs/problems (**Research Methods and Resources**)
- Project promotion (**Promote a Project**)
- Evaluation/reflection (**Evaluation: How Did the Project Go?**)
- Presentation/celebration (**Sample Presentation Outline**)

Conference: Prepare for Keystone National Conference

- Raising money for the conference (**Budget Planner**)
- Keystone National Conference Steering Committee (**Conference Steering Committee Roles**)
- Project submission (**Award Categories**)
- Other meeting focus/discussion topic _____

6. Reflection

- Consider these options for the meeting reflection:
 - Individual reflection: journaling, artwork, or acting out responses
 - Group reflection: discussing or answering questions in a group or in pairs
 - Suggested question: “What did you notice, learn or experience today?”

7. Recognition

- Think about how to give positive, specific feedback on teammates’ contributions
(For example: “Tyler, you came up with so many good ideas today!”)
- Consider how to encourage teammates to recognize each other’s contributions

8. Closing

- Set a date and time for the next meeting
- Recap actions to do before the next meeting (including tasks that need more support/work)
(You’ll use these to develop the agenda for the next meeting)

Meeting Notes