**Checklist for meeting organisation**

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| **Timing** | **Task** | **Completed** |
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| **As early as possible (ideally, no less than 8 weeks before the meeting)** |

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| **Identify what data will be needed at the meeting. For example, will you need data on**: * Current/future service model, capacity and demand
* Challenges the service faces
* Patient / staff experience
* Case for change

**Determine the data collection protocol and project team responsibilities** |

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| **Organise meeting venue** * Consider the anticipated number of attendees and the size of room to facilitate comfort and a positive working environment
* Determine if catering is allowed and if so, make requirements with the venue (e.g. tea, coffee, lunch). If not determine where attendees can access refreshments and lunch nearby
* Agree audio-visual requirements with the venue
* Laptop/screens for presentations
* Flip charts for brainstorming exercises
* Look at possible video conferencing options
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| **Agree stakeholders to invite to meeting**. To ensure you have the right stakeholders present, you may need to shorten the meeting and/or have multiple meetings  |

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|  **Create a formal meeting invite confirming:** * Meeting time, date and location
* Meeting length, objectives and anticipated output
* Desired attendee contribution to the meeting
* Deadline for confirming interest
* Your contact details
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|  **Send the meeting invitation** * Maintain a record of acceptances and declines
* Follow up any missing responses
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| **6 weeks before the meeting** |

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| **Develop the meeting agenda** (a template agenda for local adaptation is provided in the meeting resources; the agenda can be shortened if stakeholders are not available for an extended meeting)  |

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| **Circulate agenda to key stakeholders and address feedback**  |

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|  **Running the meeting. Agree who will be**: * Chairing/facilitating the meeting
* Presenting data
* Leading workshop sessions
* Consider requesting time in the facilitators’ diaries for a short briefing session one week before the meeting
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| **4 weeks before the meeting** |

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| **Develop meeting slide presentation, to include the case for change and any supporting data** (a template slide presentation for local adaptation is provided in the meeting resources)  |

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| **Develop meeting facilitation guide to ensure that meeting objectives are addressed** (a template facilitation guide for local adaptation is provided in the meeting resources)  |

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| **2 weeks before the meeting** |

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| **Follow-up with attendees** * Remind them about meeting logistics and request confirmation of attendance
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| **1 week before the meeting** | **Short briefing with Chair, Presenter and Workshop facilitators (maximum 1 hour)** * Confirm timings for each session
* Rehearse approach to workshops
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| **Create meeting packs for attendees, including agenda, attendee list and hard copies of presentation slides**  |  |
| **Confirm final details with the venue for attendee numbers and catering, including any special dietary requirements**  |  |
| **On the day** | **Arrive early and check room set-up** * Audio-visual technology (check it works and who to contact if there are issues
* Seating arrangements
* Room temperature
* Run through agenda with venue host and confirm break times
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| **No more than 1 week after the meeting** | **Circulate meeting minutes and action plan to all attendees and those who sent apologies**  |  |