**Team Meeting Planner: Preparing and running effective team meetings**

Estimated time: 6 minutes

**Learning outcomes**

After you complete this activity, you will be able to:

* Create a meeting agenda for an upcoming team meeting
* Provide an update on your goals and objectives as a team member and as a team

**Suggested use**

As a team, use the two components below to prepare for and guide your next team meeting.

1. **Setting an agenda (Template)**

***Instructions:***

1. Using the template below, in a format that works for your team, list the agenda items you need to discuss as a team below. Think about the goals for your next meeting, decisions you need to make, and what items are priorities. This will help you determine your agenda items.
2. List the chair/facilitator and note taker for the upcoming meeting.
3. If there are any documents to review ahead of the meeting, include the document link in the agenda or instructions on how to access the document.

Be sure to keep the agenda in a location where everyone on the team will have access to it.

***Tip:* Set agendas early and appoint team roles for meetings**

It is best to set your agenda early on so that everyone has enough time to review and prepare. If possible, you can always set aside a few minutes at the end of each meeting to create a draft agenda for the following meeting.

 As a team you can pick or rotate who will finalize and distribute the agenda to the team. It is recommended that each meeting has an assigned Chair (or facilitator), you can consider a rotating model where each week one team member is assigned the Chair. This individual would be responsible for sending out the agenda in advance and providing a reminder for the upcoming meeting.

 During the meeting, the Chair would ensure that all agenda items are discussed within the allocated time and that discussions are focused on the topic at hand. They will also play a facilitator role by ensuring that everyone has an opportunity to share their ideas and that no one individual dominates the conversation. Finally, the Chair is responsible for sharing the meeting minutes (notes) with the team.

We recommend that as updates are being provided to assess whether actions identified at the last meeting have been achieved in full, and if not, what actions are to be set for the following meeting. This is a good time to also revisit your "project and task tracker" document to assess your progress.

**Agenda (Template)**

*Project/ group assignment title:*

*Meeting Date and Time:*

Attendance

Present:

Absent:

Chair/Facilitator:

Note taker:

|  |  |  |  |
| --- | --- | --- | --- |
| **Agenda item and Speaker(s)** | **Documentation** | **Allocated time** | **Notes**(You can use the notes section to track meeting minutes) |
| Example of agenda: 1. Welcome (Facilitator)
 |  | 5 minutes |  |
| 1. Weekly update (Everyone)
 |  | 20 minutes |  |
| 1. Team huddle (Facilitator)
 |  | 10 minutes |  |
| 1. Upcoming milestones (Facilitator)
 |  | 5 minutes |  |
| 1. Wrap up by reviewing the action items (Facilitator)
 |  | 10 minutes | Action items (who is responsible):  |
| 1. Parking lot items
 |  |  |  |

1. **Tracking tasks (Template)**

***Instructions:***

1. Using the template below, in a format that works for your team, give space for each teammate to provide a brief update on tasks they have completed since your last meeting, items they will work on this week and items that they still need to complete.
2. If a team member is unable to attend a meeting, they can provide a written update. To keep the team accountable, be sure to capture updates by recording them. For example, you can track updates in the meeting minutes using this template.

***Tip:*** This is a great time to ask questions, get clarity and raise any concerns or challenges with your tasks and workload.

 **Weekly Update**

|  |
| --- |
| **Week of:** **Meeting date:** |
| **Name of team member** | **Done:** Items I have completed working on | **Doing:** Items I need to work on this week | **Didn’t do, but will:** Items I didn't get doneand when I will complete them |
| *Ex. Tamir* | *Ex. Uploaded three new articles with summaries in group folder* | *Ex. Creating outline for paper introduction, meeting with Jen and Fay this week to work on this.*  | *Ex. Need to create APA citations for the three articles (Due: Friday)* |

***Tip:* Are you finding your team meetings not as effective as they could be?**

Effective team meetings require that all members:

1. **Come prepared to cooperate:** Members need to do their part before the meeting so that relevant information can be brought forward at each meeting. Before adjourning a meeting, decisions should be summarized and actions document for the following meeting.
2. **Practice emotional intelligence:** Members should encourage others to share their thoughts and ideas, they should listen actively, and always respect diverse perspectives. Be present at all times by observing your own and others' emotions and reactions, and be sensitive towards your teammate’s emotions.
3. **Care about the process:** As a team, create a team charter to determine how decision making will be done. Ensure that every meeting has an agenda with all activities and objectives clearly stated, the order and dedicated approximate times for each item needs to be identified in advance of the meeting. You can allocate additional time for topics not covered in the agenda, if needed. Having a clear agenda shared in advance allows members to prepare for the discussion and with sufficient time allocated to each item, decisions can be made for the project to move forward. Consider using the agenda as a template for taking minutes and create a space that is accessible to all team members to store past agendas and meeting minutes.

**Looking for more planning tools, tips, and templates to get you ahead?**

Find strategies and techniques for effective project planning to help your team stay on track and meet deadlines [here!](https://learningcommons.yorku.ca/groupwork/planning-the-project/#plan)



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