

**Recorder:** Types or writes notes on behalf of the group; records attendance and meeting roles; tracks next steps and topics for future meetings; records a meeting rating from each member (1- 10 scale, 10 is high); electronically distributes notes to team members afterwards; saves a digital version of notes for the record.

**Timekeeper:** With the group, reviews the amount of time assigned to each agenda item; keeps track of time throughout the meeting; gives reminders if too much time is spent on one topic; when necessary, recommends that the group readjust times for remaining agenda items; announces the halfway point and when 5 minutes is remaining.

**Facilitator:** Ensures that everyone has the opportunity to participate in the conversation or activity; notifies the group when the conversation is diverging from the agenda.

**Leader:** Writes the agenda in advance; leads the group through the agenda topics; concludes with a review of next steps and solicits a rating of the meeting from each participant.

**Participant:** Comes ready to listen and participate in conversations and activities; keeps an open-mind; shares participation with others; ready to start on-time; speaks-up if learning style is not being met; communicates to group in advance if not able to attend the entire meeting. Has fun!

# Meeting Process Template (2 of 2)



**Meeting Name:**

**Date, Time, Room:**

**Invitees:**

**Attendees:**

**Absentees:**

1. Opening Question (Minutes )	<ul style="list-style-type: none"> <li>Each participant answers a non-work related question to get the group more comfortable with each other.</li> </ul>
2. Assign Meeting Roles (Minutes )	<ul style="list-style-type: none"> <li>Review the meeting roles with new members.</li> <li>As a group, decide who is the leader, recorder, timekeeper, and facilitator and make a note on the meeting minutes.</li> <li>Discuss any questions about these roles during the meeting.</li> </ul>
3. Review Agenda and Times (Minutes )	<ul style="list-style-type: none"> <li>The leader briefly states what is on the agenda.</li> <li>The group decides how much time to spend on each agenda item, if there are any other topics they want to add, and if there are any agenda topics that should be discussed after the meeting.</li> <li>Group members share if they must leave the meeting early.</li> </ul>
4. Work Through Agenda Items (Minutes )	<ul style="list-style-type: none"> <li>The group progresses through the agenda following the meeting roles outlined below. Everyone plays the participant role.</li> </ul>
5. Review Highlights from Meeting Minutes and Next Steps (Minutes )	<ul style="list-style-type: none"> <li>The recorder shares the key points from the meeting minutes, clarifies any questions, and reviews the next steps.</li> <li>The group adds and edits the next steps and minutes as necessary.</li> <li>After the meeting, the recorder shares these notes via email.</li> </ul>
6. Plan Next Agenda (Minutes )	<ul style="list-style-type: none"> <li>The leader helps the group decide on topics to address in the next meeting.</li> </ul>
7. Evaluate Meeting (Minutes )	<ul style="list-style-type: none"> <li>Every participant evaluates the meeting on a 1-10 scale (1 is low, 10 is high).</li> <li>In addition to the numeric value, each participant makes a comment on what went well and what could go differently next time.</li> </ul>
<b>Next Meeting: Date, Time, Room #</b>	

**Agenda Items:**

