

**This checklist is intended to help backbone organizations with work group meeting planning and execution**

**Working Group Meeting Planning and Execution Checklist**

|  |  |
| --- | --- |
| **Action** | **Timing** |
| Schedule meeting location | 1 month out |
| Manage meeting logistics: lunch, conference line, attendee lists, printing | 3-4 weeks out |
| Check/update current contact list of WG members | 3-4 weeks out |
| Send calendar invite to members for meetings | 3-4 weeks out |
| Formal agenda | 1 week before WG mtg |
| PowerPoint Deck / handouts / other materials finalized | 2 business days before WG mtg |
| Internal agenda (if needed) | 2 business days before WG mtg |
| Talking points for Co-Chairs (if needed) | 2 business days before WG mtg |
| Email any pre-read material/reminder to members  | 3-5 business days before WG mtg |
| Answer questions for WG members between meetings | - |
| Take notes in WG meeting on Reporting Template | - |
| Email followup to members (thanks, next mtg date,etc) | w/in 3 days after WG mtg |
| Email or phone contact with those who didn’t attend | w/in 3 days after WG mtg |
| Update Working Group Planning Template, as needed | w/in 3 days after WG mtg |
| Fill out Reporting Template to SC  | 1 week prior to SC mtg (less depending on WG mtg date) |
| Document SC action on Reporting Template and send to WG | w/in 3 days of SC mtg |