

Meeting Agenda Worksheet

- What is the goal of the meeting in one clear sentence?

- What is the most appropriate format for the meeting?
 - In-person – where will the meeting take place
 - Zoom
 - Phone

- Who NEEDS to attend: Keep in mind need versus wants – many will want to attend but who needs to attend?
 - What information does this person have and how will they contribute?
 - Keep the attendance as low as possible – usually six or under.

- What information do I need to request and from whom?
 - Burial plans
 - Medical records or medication lists
 - Contact information for friends and other family members?

- Set a date and time for the meeting and notify attendees

- Request concerns from attendees and be clear that the agenda is robust so concerns sent ahead of time will not be addressed

- Compose final agenda and publish to attendees