

# Leadership Framework tools and resources

## Meeting review checklist



### **Purpose of this document**

The purpose of this **meeting review checklist** is to help managers assess the effectiveness of their meetings and to plan for improvement. It can be used in a number of ways.

- to review a meeting you have led
- to review a meeting you have participated in
- to gain feedback from team members (in this case each team member is given a copy of the checklist. The manager then collates the results and provides the team with feedback and actions for improvement).

### **Instructions**

Rate each statement using the rating system below.

Rating system:

1. means 'There is no evidence of this happening'
2. means 'This happened occasionally but with no pattern'
3. means 'This happened frequently but there is room for improvement'
4. means 'This happened. There is consistency and reliability'.

Identify areas for improvement.



## Meeting review checklist

|   |                        |          |          |          |
|---|------------------------|----------|----------|----------|
| <b>Type of meeting:</b>   | <b>Date of review:</b> |          |          |          |
| <b>Overall effectiveness</b><br>(Place the total for each rating from the checklist below)  | <b>Totals</b>          |          |          |          |
|   | <b>1</b>               | <b>2</b> | <b>3</b> | <b>4</b> |
|   |                        |          |          |          |
| <b>Define focus for improvement efforts:</b><br>(Areas identified from the review that most need attention) <ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul> |                        |          |          |          |

| Meeting element  | Rating                   |                          |                          |                          |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
|  | 1                        | 2                        | 3                        | 4                        |
| <b>Preparation</b> <ul style="list-style-type: none"> <li>• Agenda sent/received prior with clear context, purpose and specified outcomes</li> <li>• All required papers distributed in good time to prepare</li> </ul>  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Team leader contribution</b> <ul style="list-style-type: none"> <li>• Provides background to the meeting (context)</li> <li>• Defines the purpose of the meeting</li> <li>• Articulates desired outcomes</li> <li>• Leads issues identification and analysis</li> <li>• Contributions are encouraged with adequate time to question, debate and review</li> </ul> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |



| Meeting element   | Rating                   |                          |                          |                          |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
|   | 1                        | 2                        | 3                        | 4                        |
| <ul style="list-style-type: none"> <li>Differences are constructively managed</li> <li>Stays on track to agreed meeting process</li> <li>Meeting agenda and timing was maintained</li> </ul>  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Team member contribution</b> <ul style="list-style-type: none"> <li>All the required participants attended the meeting</li> <li>All participants are prepared</li> <li>Open and productive dialogue is used</li> <li>Team members contribute to issues identification and analysis</li> <li>All team members are respectful of others</li> <li>All team members are committed to decisions</li> <li>All team members support the team process</li> <li>All team members complete assigned tasks by due date</li> </ul> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Content</b> <ul style="list-style-type: none"> <li>Topics listed are appropriate to the purpose of the meeting and are agreed</li> <li>Objectives are clear</li> <li>All essential facts are provided in support</li> <li>All critical issues are identified and options presented/discussed/reviewed</li> <li>Meeting output is of good quality</li> <li>A review of the meeting is held and actions noted for improvement</li> </ul>   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Decisions</b> <ul style="list-style-type: none"> <li>Decisions are clear and understood by all</li> <li>Planned outcomes are achieved</li> <li>The decisions are recorded</li> <li>There is team commitment - all will speak with one voice going forward</li> </ul>   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |



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