Meeting agenda templates

These agenda templates are samples. The activities included in them should be modified or removed based on the needs and goals of your group.

Internal agenda template

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| **Start: End:   Estimate:** Begin  1 hour before attendees arrive | **Arrival & preparation**   * Put up signs, if needed, to direct attendees to the meeting room * Arrange tables and chairs in a large circle, classroom, or small group format, as desired * Arrange any handout materials and printed agendas * Display sign-in sheet (or pass it around during welcome remarks) * Provide a location to put stakeholder agency information and other helpful resources * Check A/V equipment and test any presentations (PowerPoints, etc.) * Prepare any refreshments * Confirm any last-minute updates to agenda (e.g., surprise speakers) * Confirm who will take the following roles: note-taker, exercise facilitator, person to progress any presentation slides, time-keeper |
| **Start: 8:30 End: 9:00** Estimate:15 min | **Meet and greet**   * Provide table tents or nametags for attendees to write their name and organization * Make an announcement five minutes before the retreat starts |
| **Start: 9:00 End: 9:15** Estimate:30 min | **Welcome remarks**   * A **member of the planning group** thanks everyone for attending, go over logistics (such as bathroom location), explain the purpose of the convening, and acknowledge any planning partners. * A **speaker** then provides opening remarks. |
| **Start: 9:15 End: 9:45** Estimate**:** 30 min | **Introductions** - Each stakeholder briefly shares their name, position, organization, and interest in being part of the network |
| **Start: 9:45 End: 10:15** Estimate**:** 30 min | **Background information** The facilitator or another designated person shares a presentation that provides:   * An overview of networks * A summary of CFPB research on networks * A description of promising practices related to combating elder financial exploitation * Stories about other successful local and regional networks |
| **Start: 10:15 End: 10:45** Estimate**:** 30 min | **Networking break** |
| **Start: 10:45 End: 12:30** Estimate: 105 min | **Group exercises** |
| **Start: 12:30 End: 1:00** Estimate:30 min | **Lunch** (brown-bag or sponsored)  After lunch, remind attendees to write down any additional thoughts on the sticky notes provided and stick them on the “Parking Lot for Afterthoughts.” |
| **Start: 1:00 End: 2:00** Estimate:60 min | **Training/Presentation** by [Individual, Organization] |
| **Start: 2:00 End: 3:00** Estimate:60 min | **Training/Presentation** by [Individual, Organization] |
| **Start: 3:00 End: 3:30** Estimate:30 min | **Q&A session** |
| **Start: 3:30 End: 4:00** Estimate:30 min | **Next steps and wrap-up** |

External agenda template

[Location]’s Elder Fraud Prevention & Response Network Retreat

[Location]

[Date]

**Agenda**

8:30-9:00 am  **Meet and greet**

9:00-9:15 am  **Welcome, remarks by [Name, Organization]**

9:15-9:45 am  **Introductions**

9:45-10:15 am  **Background information**

10:15-10:45 am  **Networking break**

10:45 am-12:30 pm  **Group exercises**

12:30-1:00 pm  **Lunch** (brown-bag or provided by [Organization])

1:00-2:0 pm  **Training/Presentation by [Name, Organization]**

2:00-3:00 pm  **Training/Presentation by [Name, Organization]**

3:00-3:30 pm  **Q&A session**

3:30-4:00 pm  **Next steps and wrap-up**