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

|  |  |
| --- | --- |
| **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: 8:30End: 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: 9:00End: 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: 9:15End: 9:45**Estimate**:** 30 min | **Introductions** - Each stakeholder briefly shares their name, position, organization, and interest in being part of the network |
| **Start: 9:45End: 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: 10:15End: 10:45**Estimate**:** 30 min | **Networking break** |
| **Start: 10:45End: 12:30**Estimate: 105 min | **Group exercises** |
| **Start: 12:30End: 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: 1:00End: 2:00**Estimate:60 min | **Training/Presentation** by [Individual, Organization] |
| **Start: 2:00End: 3:00**Estimate:60 min | **Training/Presentation** by [Individual, Organization] |
| **Start: 3:00End: 3:30**Estimate:30 min | **Q&A session** |
| **Start: 3:30End: 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**