

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 <ul style="list-style-type: none">▪ 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 <ul style="list-style-type: none">▪ Provide table tents or nametags for attendees to write their name and organization▪ Make an announcement five minutes before the convening starts
Start: 9:00 End: 9:15 Estimate: 30 min	Welcome remarks <ul style="list-style-type: none">▪ 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

Elder Fraud Prevention & Response Networks: Event Brief for [Location] Convening

Start: 9:45 End: 10:15 Estimate: 30 min	Background information The facilitator or another designated person shares a presentation that provides: <ul style="list-style-type: none">▪ 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
Convening
[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