

PLANNING YOUR FIRST

FORMAL MEETING

Checklist

This checklist gives you all the things you need to do to prepare for your first formal meeting.

Action	Who?	By when?
1. Identify a proposed governing document and set of rules – use the advice we refer to in the Formalising the organisation of your group section.		
2. Discuss and agree all the clauses and make sure you have the skills, knowledge and tools to administer everything in the governing document – e.g. will you use a hard copy cash book to record financial transactions or excel, and how will you keep membership records while adhering to the General Data Protection Regulations?		
3. Choose interim committee members to take on the Chair, Secretary and Treasurer roles until someone can be officially appointed at your first general meeting.		
4. Do some research on which community bank accounts are available and what benefits they offer or costs are involved.		
5. Agree the date of the first meeting, making sure that all of the people currently involved in the group can attend, so you know you'll have a good crowd!		
6. Advertise your first meeting well and be ready to sign up members of the group.		
7. Organise a way to share the draft governing document with the people attending the meeting – this might be printing out some copies, or it could be having a laptop and projector available. It will be important that all your new members know what they are signing up to.		

