forumsherpa

Annual Forum Plan Worksheet

Checklist

- ❑ Complete Forum Alignment Exercise (e.g. 3 B's)
- ❑ Take a Forum Health Survey
- ❑ Review and Update the Forum Norms/Constitution
- ❑ Assign Member Roles
- ❑ Create Your Annual Meeting Calendar
- ❑ Review and Update Parking Lot
- ❑ Begin Planning the Forum Retreat
- ❑ Set Forum Goals (optional)
- ❑ Discuss & Decide on an Annual Theme (optional)

Forum Member Roles

Role	Description / Tasks	Name
Moderator		
Moderator Elect		
Treasurer		
Retreat Planner(s)		
Parking Lot Attendant		
Social Chair		
Technology / Administrative		
Other		

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Meeting Calendar / Schedule

Date, Time	Host/Location	Ice Breaker	Presenter/Coach	Meeting Content/Notes
January				
February				
March				
April				
May				
June				

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Date, Time	Host/Location	Ice Breaker	Presenter/Coach	Meeting Content/Notes
July				
August				
September				
October				
November				
December				