

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		

Meeting Calendar / Schedule

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

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