

Tool 4: Agency Meeting Preparation Sheet

How to use this tool: Complete this to help prepare for any meeting with a federal or state agency: a scoping session, a consultation meeting, or a routine update. Fill it in before the meeting, bring it with you, and use the follow-up section afterward to record commitments. See Preparing for Agency Meetings in the Strategic Engagement section of the Toolkit.

Project name		Organization	
Person responsible		Last updated	

Meeting details

Meeting date and time	
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Agency and program	
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Who from the agency is expected, and what authority do they hold?	
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Who from the agency is the decisionmaker (if known)?	
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Who is attending from our community or organization (names and titles to share with the agency)	
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Our specific questions or decisions needed (2 to 3 maximum)

1.	
2.	
3.	

Our community's top concerns

1.	
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2.
3.

What we are prepared to say

Yes to	
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No to	
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Hold until we have more information on	
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Follow-up

Notetaker assigned	
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Commitment or follow-up item	Who is responsible	Due date	Done?

Tip: After the meeting, send the agency contact a short written recap of what was discussed, what was committed to, and by when, and ask them to correct anything you got wrong.