Board-Packet Preparation Checklist

For small-town borough councils, township boards, and nonprofit boards

[ ] Assign an owner to each agenda item.
[ ] For a planned meeting within the next seven days, send an in-app reminder to each agenda-item owner whose reminder preference is enabled.
[ ] Gather agenda items and add supporting materials to the packet.
[ ] Review the assembled agenda and packet materials before publication.
[ ] If approval is required for the organization or packet, obtain and record the approver's approval before publishing.
[ ] Publish the packet when it is ready.
[ ] If publication notifications are enabled, confirm the configured members or roles receive the email.
[ ] If an upcoming planned meeting's packet is still unpublished, follow up when its reminder rule is enabled.