

C.7: Checklist – Public Engagement Meeting Planner

Having well-thought-out meetings requires a lot of preparation. The following checklist will help you work through who, how, and what your meeting will address.

TARGET ATTENDEES / STAKEHOLDERS

- Community members
- Community leaders
- Government leaders
- Civic groups
- Other _____

GETTING THE WORD OUT

- Social media
- Email
- Website
- Notification tree (using contacts to spread the word)
- Electronic invitation system (allows for collection of RSVPs)
- Existing publications (e.g., newsletters or newspapers)
- Posters or flyers

INVITATION MESSAGING AND FORM

- Clear, concise language written for the potential audience rather than bureaucrats or lawyers
- Meeting expectations - What will the audience participate in and what can they learn?
- Contemplate and address in advance the potential attendee's question of why they should attend
- Emphasize value of community member input
- Double check the date, time, and location information
- Consider whether supplementary materials will be distributed with the invitation

WHEN

- Weeknight vs. weekend
- Morning, afternoon, or evening
- Do you want to send a message of inclusiveness? If yes, carefully consider your timing.
- Is there a holiday (religious or secular) that may conflict?
- Can this meeting be hosted multiple times?

FORMAT CHOICE

- Lecture
- Interview
- Mainly Q & A with short introduction
- Workshop or other interactive format
- Public hearing or debate
- Open house
- Facilitated learning
- Small group discussion or focus group
- Small group advisory board or expert panel
- Other _____

AGENDA SPECIFICS

- How much time do you have?
- How much time do you need?
- How important is audience participation and engagement (relates to timing, structure, and content)?
- How do you intend to facilitate audience participation?
- Have you solicited participation from civic leaders or other potential stakeholders?
- Are there opening statements or speeches or talking points?
- Consider anticipating and addressing audience questions and concerns from the start (e.g., cybersecurity, data ownership, data access, transparency, etc.)
- Do you have a presenter who can address technical questions?
- Consider key topics and narratives to engage the audience

RULES OF ENGAGEMENT

- If you are recording or transcribing the event, have all participants been notified? Will those materials be made available publicly, or could they be compelled through a Public Records Request?
- If the event is all or partially off the record, what will participants be able to relay after the event? For example, if the event will be held under the “Chatham House Rule,” where attributing specific statements or points of view to any participant or class of participant is not permitted.⁴³
- What will be considered on and off topic, and how will off topic discussions be handled?
- Will press be present at the event?
- Who will be permitted to speak and when? (E.g., time and turn restrictions, and why they are in place)
- Allow for questions in advance or in lieu of attendance?
- Do you have/need a code of conduct?

WHERE AND HOW: IN-PERSON MEETINGS

- Who will host and is there a strategic reason to have a certain host? A government or academic building may inspire confidence for example and illustrate partnerships. A community building, on the other hand, may demonstrate a commitment to inclusiveness and collaboration.
- Event space accessibility, capacity, and comfort
 - Is the space big enough? Are the temperature and lighting comfortable? Are there bathrooms, trashcans, and recycling nearby?
 - Is the space convenient for your audience to reach? Is it near public transit? Is there sufficient (free) parking?
 - Can you go to your audience rather than having them come to you?
 - What are the costs involved?
 - Is the space accessible to persons with disabilities? (Ramps, elevators, appropriate spacing between and at tables for wheelchairs, etc.)
 - Do you need tables, chairs, or a podium? How will they be arranged in the room?
 - Do you need signs or staff to direct people around the space?
 - Do you need to provide childcare?
 - Are you serving food or drinks?
 - Will there likely be language barriers? Do you have plans to provide a translator and/or translated materials?
 - What security needs or emergency plans do you have in place? (E.g., first aid kits, fire escape routes, power outage contingencies, etc.)

Technology

- Is the available technology sufficient? (Audio/visual or display technologies, microphones, computers, projectors and screens, laser pointers, etc.)
- Is there Wi-Fi or wired internet connectivity strong enough for participants and/or presentations?
- Should the event be fully or partially live streamed or video recorded? (If so, audience members participating in-person should also use microphones).
- Should questions come from a virtual audience (e.g., via social media, email, or video conferencing)?

WHERE AND HOW: VIRTUAL MEETINGS

What tools or capabilities are important in your digital space or platform?

- Storing and presenting information
- Annotation and comment tools
- Real-time editing
- Polls
- Video streaming or playback
- Social media plug-ins

What additional tools will be needed to achieve those capabilities for participants and/or presenters?

- Microphones and web cameras for all (consider quality vs. cost tradeoffs)
- Wired vs. wireless connection for participants
- Ability to remotely mute participants if background noise becomes disruptive
- Anonymous post-event survey or evaluation forms
- Digital copies of all event materials
- Digital security and emergency plans (in case of a sudden surge of participation or disruption in Internet service)

Is the digital space accessible? (e.g., closed captioning, keyboard commands, color blindness considerations, etc.)

Will participants need to register or sign-in to the virtual meeting space or platform? What level of authentication/verification will be required? (Allowing anonymous participation may drive engagement up, but might open the process to trolling).

Do you have an appropriate privacy policy and terms of service in place for attendees? (Be careful about repurposing boiler plate language from other websites, which may include broad rights to share personal data or limit users to arbitration).

SUPPORT AND SUPPLIES

Discussion facilitators

Assistants – greeters, note takers, technical or physical support staff, accessibility support (translators, sign language interpreters, etc.)

Subject matter experts and IDS representatives

Sign-in and contact sheets (useful for follow up, but keep in mind that some attendees may prefer to be anonymous)

Name tags and/or tent cards

Agendas (with estimated times)

Informational and discussion documents, presentations, and visual aids

Staff or speaker biographies and contact

White boards, easels, or other interactive discussion tools

Anonymous post-event survey and evaluation forms

Notepads and writing tools for participants

Directional signs

Microphones, computers, and other display materials

Recording device, if applicable

FOLLOW UP

- Survey
- Social media
- Blog
- Direct contact
- Email
- Who is responsible for follow up and follow through?
- Will there be additional meetings?