## PROCESS DESIGN AND AGENDA CHECKLIST

*Early planning meetings:*

- [ ] Consult planning team and participants:
  - Who is on the planning team? What will their roles be in prep and delivery?
  - What leaders or others should be consulted about meeting goals and outcomes?
  - Who are presenters, guests, facilitators, moderators, hosts?
- [ ] Discuss context and purpose:
  - Why this meeting, why now? Where does it fit in the flow of related work?
  - Are there hot topics, current events, "elephants in the room" that might come up? If they do, how will we address them?
- [ ] Clarify desired outcomes:
  - What do we want to result from this meeting? Desired products or outcomes?
  - What do we want people to experience or feel as a result of this meeting?
  - What would success look like?
- [ ] Consider audience and clarify roles:
  - How many people are expected?
  - Who is in charge of registration / RSVPs?
  - Who is invited? How well do they know each other?
  - Will leaders or decision-makers be there for all, or part?
- [ ] Set timetable for communications
  - How will we communicate with participants before, during, and after?
  - Do we need a rehearsal / tech test?
  - When will we send out the final agenda or other meeting materials?
  - How will we follow-up after the meeting?

*As you develop and refine the Draft Agenda:*

- [ ] Decide who does what and when: hosts, facilitators, speakers, participants
  - Are there key activities or agenda items that must be included?
  - Do speakers and facilitators represent the variety of perspectives, experience, knowledge that will be participating in the room?
  - What if things go sideways? What are our backup plans?
- [ ] Explore interactions and activities
  - What will work for this group size?
  - What activities will best support the desired outcomes?
  - How do they fit with the flow, content and energy of the group?
  - How will you set up, facilitate, and debrief?

  - Build in social time and breaks
  - Did we include a variety of activities to engage different learning styles?

- ❑ Confirm logistics (see below for onsite and online)
  - Where is the meeting?
    - Onsite: Room size, setup, access, comfort.
    - Online: Audience size, platform (Teams, Zoom, WebEx?), who will host
  - How will people get there?
    - Onsite: Itinerary and travel logistics, special considerations (traffic, transit, likely time or participation constraints and concerns).
    - Online: Orientation materials ("how to join, how to participate"), tech support before and during meeting
  - What materials, tech, setup will we need? *See checklists below.*
  - How will the space support the theme and purpose of the meeting?
  - How will people move around, interact, and use the space?
  - Are there needs for accommodation among participants or speakers?
  - If going offsite (e.g., field trip) how will people get there?
  - If meeting includes mealtimes or social hours, how will that work?

# ONLINE PREP CHECKLIST

*Webinar Planning Prep:*

- ☐ Fly with a co-pilot! Plan to have 2-3+ facilitators for the event. Assign roles: front of room facilitator, interactions (chat, breakouts, raised hands), recording, tech support, notetaking, timekeeping, managing presentations and speakers, etc.
- ☐ Setup event in the webinar platform. Confirm webinar settings for presenters and participants (audio, video, chat, Q&A, notes, screen-sharing, presenter controls, breakouts, recording, etc.)
- ☐ Have alternate ways to join the event that accommodate different needs and contingencies, e.g. in webinar or by webinar phone line
- ☐ Plan a tech test / rehearsal / prep meetings in the same webinar platform, as needed to test technology, plan for sessions, and orient speakers and/or participants.
- ☐ Share meeting materials via email or website (event details, webinar links, meeting materials, agenda, etc.)
- ☐ Send calendar invitations that include agenda and webinar links to all event participants and speakers
- ☐ Request final presentation materials a few days in advance. Post or share PDF versions for participants who may be unable to join full webinar.
- ☐ Monitor RSVPs to inform interactions and timing
- ☐ Create a Participant list for taking attendance and tracking participation
- ☐ Create a Photo roster with slide-guide (if using)
- ☐ Create a "Notes to post in chat" document with key instructions, interactions and information you plan to post in chat

*Event Day Webinar Setup:*

- ☐ Open the webinar at least 20-30 mins early.
  - Check webinar settings and permissions for presenters and participants
  - Load or prepare presentations, materials, videos, etc.
  - Prep interaction settings, recordings, polls, etc.
- ☐ Orient and welcome speakers and participants as they join

## ON-SITE MATERIALS CHECKLIST

*Possible equipment, supplies and materials you may choose to use in the meeting.*

- ❑ Name tags, or table name tent cards
- ❑ Pens and/or pencils and loose paper or notepads for tables
- ❑ Room décor: posters, displays, props that convey a theme or set the tone
- ❑ Table centerpieces, creative activities or fidget toys
- ❑ Flip chart paper pads and easel stands (or whiteboard) and markers
- ❑ Activity supplies, e.g., Post-it notes, notecards, dot stickers
- ❑ Painter's tape (**Note:** check with the site manager about what to use, if anything, on walls)s
- ❑ Laptop and adapters for the newer HDMI laptop devices
- ❑ Jump drive for transferring/backup presentation
- ❑ LCD projector (and screen, depending on room)
- ❑ Speakers (to play videos or music)
- ❑ Microphone, with extra batteries or power pack (if needed)
- ❑ Remote device to control slide deck
- ❑ Bell/gong/rainstick for getting attention
- ❑ Watch/clock/timer
- ❑ Handouts, activity sheets, copies of evaluation, etc.
- ❑ Instructor notes, lesson plan and/or printout of slides
- ❑ Water and snacks

## ON-SITE ROOM SETUP

*Some considerations for setting up the room for the meeting*

- ❑ Arrive 60-90 mins early for setup, as needed (or do the day before).
- ❑ Set up registration tables, if using, with name tags and checklist
- ❑ Set up break table, if using, with water and snacks – preferably out of the way
- ❑ Set up room décor or displays
- ❑ Arrange the tables and chairs as desired.
  - Check room setup for flow of activities.
  - How will people move from here to there? Are there things in the way? Chokepoints?
  - Are there good sightlines – everyone can see each other and the presenters.
  - Have you planned for accessibility needs?
- ❑ Setup participant tables
  - Centerpieces and creative aids/toys
  - Pens, pencils, paper, notebooks
  - Copies of agendas, handouts, activity supplies
- ❑ Position flip charts for visibility. Ensure you have enough chart markers.
- ❑ Setup and test tech: laptop, speakers, projectors, microphones
- ❑ Set up Facilitator Area with your notes and materials
- ❑ Check lighting, airflow, temperature, accessibility and adjust as needed
- ❑ Locate emergency exits, bathrooms, snacks, other key logistics
- ❑ Allow 10 mins a half-hour before the meeting for your own warmup, centering
- ❑ Be in the room at least 15 mins before meeting, ready to meet and greet participants as they arrive