



Local Roadmap Meeting Planning Checklist

Identify community stakeholder participants.

- Do participants reflect the community of focus?
- Have you identified public sector, private sector, and nonprofit participants?

Determine a day/time/duration for the meeting.

- Consider if the day/time is accessible to people outside of regular daytime working hours. This is especially important if community members who are invited are NOT employees of organizations that serve as representatives/advocates; their weekday/daytime availability may be limited.
- All-day meetings (approx. 8 hours) will require food, beverages, and three breaks (mid-morning, lunch, mid-afternoon). Half-day meetings (approx. 4 hours) will require beverages (minimally) and one break.
- Send calendar invitations to prospective participants so it populates on their calendars and to enable easier attendance tracking.

Determine a format for the meeting (in-person or online).

- Do all prospective participants have computer/internet access? This may require an in-person meeting.

IN-PERSON MEETING LOGISTICS

- Is the site accessible to public transportation?
- Is it in a well-lit location (if it will be held in-person, at night)?
- Is it wheelchair accessible?
- Does it offer sufficient/wheelchair-accessible restrooms?
- Is there sufficient heating/cooling for audience comfort?
- Is there a blank wall or a large pull-down screen for projection?
- Is there internet access at the facility and are log-in credentials available?
- Is there sufficient seating/circulation for the number of people invited?
- Have you arranged for an interpreter/s based on participants in the community of focus?
- Will you have hand-outs (translated) and if so, must any be reviewed by participants in advance?
- If you will be showing any videos, are they captioned?



IN-PERSON MEETING SUPPLIES

- Projector, microphone, portable screen (A mic is unlikely if the group is limited to 15 people; consider participants who may be hard of hearing.)
- Agenda
- Sign-in sheets
- Hand-outs
- Light refreshments (e.g., water, coffee/tea, cookies, fresh fruit, packaged granola-type bars, small plates, paper cups for hot liquids, napkins, small paper plates).
 - Be sure to identify refreshments' ingredients (gluten/type of sweetener, avoid nuts, etc.)
- Pencils, tablets/paper, easels, large wall Post-It notes, small colored Post-It notes (for prioritization)
- Photo permission-release forms (This form should indicate that any photos taken may be used for public-facing purposes (website, documents, social media).

ONLINE MEETING LOGISTICS

- Consider a widely used platform that is easy for prospective participants to use (e.g., Zoom, Teams, Google Meet).
- Be sure the meeting invitation includes a link to the meeting (and any passcodes you may require).
- Identify (and advance-request) one other person to serve as the meeting co-host, so internet interruptions by the main host do not thwart meeting progress. The co-host will need the PPT.
- Consider how readily the platform can "pin" an ASL interpreter (Zoom is ideal for this) and display captioning.
- Will you record the meeting? If so, be sure to advise participants of that at the outset of the meeting.
- Decide if you will save the recorded meeting to the cloud or to your computer/server.

Invite participants.

- Consider using multiple modalities to invite participants and send meeting reminders:
 - Email
 - Phone call
 - Social channels (private messaging)
 - In-person
 - For community-wide invitations, consider online and physical postings in high-traffic locations.
- Make the purpose, location/platform, and dates/times clear. Include a contact person/email/ phone for more information or assistance.
- Consider including links to or copies of information in advance.
- Include an RSVP date/method (online form, phone, email, etc.)