

## **Chapter Guide to Organizing, Planning and Executing a Town Hall Meeting**

ACEP has developed this guide to assist chapters in hosting a town hall meeting that engages policymakers, stakeholders, the media and the public in understanding and addressing a critical issue facing emergency medicine. This guide is intended to cover the necessary steps involved in planning an effective town hall meeting, provide additional strategies to help chapters enhance the success of the project and include sample resources to assist the chapters in their efforts. A town hall meeting can have a variety of formats and components, and this guide is not intended to inhibit chapters from pursuing an organizational approach that differs from some of the procedures described below. Nonetheless, the guide provides a framework to assist chapters that are not sure how to plan and execute an effective town hall meeting, and to cover the variety of factors that should be considered when embarking on a project of this nature.

### **What is the Purpose of a Town Hall Meeting?**

At its essence, a town hall meeting is exactly what it sounds like...members of a community coming together to discuss an issue or issues of common concern. Most town hall meetings are open to the public and encourage participation from the audience. Government officials or agencies typically conduct town hall meetings to present a new proposal that impacts the community or discuss an emerging issue of concern. In either case, the primary purpose of these town hall meetings is to provide information to the community and collect feedback. For a town hall meeting dedicated to an emergency care issue, the “community” can include emergency care providers, other stakeholders, policymakers and interested citizens.

### **Establishing the Objectives for Your Town Hall Meeting**

To effectively plan and coordinate a town hall meeting, chapters must first define their objectives for the project. Knowing precisely what you hope to achieve from your town hall meeting will have a significant bearing on numerous aspects of the planning process, including the contents of the agenda and the determination of who should serve as panelists, speakers and invited guests.

As stated above, the traditional town hall meeting format is well suited to raise awareness of an issue and solicit feedback from a defined community. While raising awareness of an emergency care issue is a valuable goal in itself, a chapter can maximize the value of its town hall meeting by expanding the scope of the agenda. Beyond a simple dialogue on the nature and significance of the issue, the town hall meeting agenda can also include an exploration of potential solutions to the problem and a discussion on the next steps needed to ensure that progress will be made in pursuing those solutions. With an agenda that includes separate discussions on the nature of the issue and the steps needed to address the issue, the town hall meeting can serve as a springboard for advancing advocacy efforts that may lead to meaningful policy changes. The creation of a comprehensive agenda designed to maximize the impact of a town hall meeting is discussed in greater detail later in this guide and a sample agenda is included in the addendum.

Additionally, another key component in meeting the dual objectives of raising awareness and advancing advocacy efforts is the generation of media coverage. Working with national ACEP, chapters should develop a strong media outreach plan to maximize the effectiveness of the town hall meeting project. In doing so, chapters should take into account that the media may not be as interested in covering the meeting itself as they are in covering stories related to the issue. Engaging in an effort to develop and pitch compelling story ideas to the media in order to generate pre-meeting publicity on the issue can be extremely effective in bringing public and

governmental attention to the issue and creating interest in the town hall meeting. Additional details on the elements of a comprehensive media outreach effort are contained later in this guide.

## **Getting Organized**

There are numerous tasks associated with the planning and execution of a town hall meeting requiring an organizational plan and a clear delineation of responsibilities for those charged with carrying out various aspects of the event. At a minimum, a project coordinator should be selected to oversee the planning process. The coordinator should possess solid organizational skills and should be prepared to devote sufficient time to ensuring effective implementation of each facet of the plan. Chapters may choose to have a chapter member or a staff person serve in this role or they could contract with a third party to perform all or part of this function.

In addition to the project coordinator, chapters may want to consider creating a task force of volunteers to help oversee the project, with key responsibilities divided among the task force members. Major areas of responsibility could include securing panelists/speakers, site selection and meeting logistics, media relations, stakeholder communications and public outreach. If the issue is a high priority for other organizations as well, chapters might also consider inviting representatives from those organizations to participate in the planning process and serve on the task force.

## **Determining the Chapter's Budget for the Town Hall Meeting**

While hosting a town hall meeting can cost many thousands of dollars, chapters can put on a high-quality meeting for much less money by avoiding some of the significant expenses that might normally be associated with meeting planning. As discussed elsewhere in this planning guide, it is not necessary to hold the meeting at a high-priced hotel. Excellent free or low-cost meeting space options may be available. There may also be a desire to bring in a high-profile speaker to help enhance interest in the meeting among the media and the public. While a "big name" speaker can have significant impact, paying the speaker's honoraria and travel expenses may prove to be too costly. Certainly, chapters may want to explore such opportunities and may find that high-profile speakers will agree to participate at little expense. But it is not necessary to include a nationally-renowned expert or other high-priced speaker in order to attract attention to the town hall meeting. The media plan outlined in this planning guide is intended to help raise awareness of the issue and draw attention to the meeting without the inclusion of a "big name" speaker.

Beyond these two considerations, other expenses that chapters should expect to incur include:

- Office supplies
- Printing of flyers, posters, handouts, signs
- Postage
- Telephone
- Possible A/V equipment rental
- Refreshments (for breaks during or after the meeting)
- Staff time

## Setting the Agenda

With your objective in mind and an understanding of the resources you have at your disposal, you can now begin crafting a planning strategy that will help you maximize your ability to achieve your desired outcome. You will first need to develop a preliminary agenda for your meeting, which will help guide a number of subsequent decisions in the planning process. As mentioned earlier, developing a two-part agenda that focuses both on the substance of the issue and potential ways to address the issue may be the best way to achieve the dual objectives of raising awareness and advancing your advocacy efforts. An agenda of this type may include the following elements:

1. A presentation from a subject expert outlining the issue, its causes and its severity
2. A discussion from a panel of stakeholders on their perspectives of the issue
3. Audience input/questions on the issue
4. Break
5. A legislator/official/other authority outlines current/past efforts to address the issue
6. Panelists provide their perspectives on these efforts and impediments to action
7. Audience input/questions on current efforts and suggestions for next step
8. Moderator leads interaction with panelists to find consensus on next steps

Obviously, the specifics of each chapter's issue and how it is or is not being addressed in their state will likely dictate some modifications to this example, but this model demonstrates how an agenda can be crafted to serve the dual objectives referred to above. As with any contentious issue, it may be difficult to reach a consensus on what the right solution is or even on what the next steps to be taken should be. While agreement on a specific proposed solution would represent the best possible outcome, the next step may be little more than an agreement by all parties to meet again to engage in further discussions. A more desirable outcome would be an agreement to support the call for a governor's or legislative task force to study the issue and develop recommendations. If more substantive agreement isn't possible, you may want your moderator to suggest that the parties at the meeting agree to support the call for a task force to be established. This would allow the participants to demonstrate a commitment to addressing the problem without putting them in the position of having to agree on a particular proposal. (A chapter guide to establishing a governor's task force is available on the state advocacy page of the ACEP web site.)

Once you've set your agenda, then you can start crafting additional plans accordingly; such as determining the participants that need to be involved and selecting the appropriate date and location for the meeting.

## Identifying Key Participants

A significant key to a successful town hall meeting is the inclusion of qualified, informed and influential individuals to serve as moderator, panelists and guest speakers. Determining the individuals you want to serve in these roles (and back-up candidates in case they can't participate) should be among the first tasks performed in the planning process. Invitations to all speakers will need to be delivered as early as possible to confirm their interest and willingness to participate, and to identify problematic dates where scheduling conflicts might occur. Initial invitations can be made in person or over the phone, which may be more positively received by the invitee if the verbal request is made by a colleague or acquaintance. A written invitation should also be sent as a follow-up to the conversation, along with a formal request for an RSVP.

**Moderator:** The importance of a good moderator can be easily overlooked, but it is a critical factor in determining a meeting’s success or failure. Ideally, the moderator should have some familiarity with the issue, but that knowledge may be secondary to his or her skills in keeping a meeting moving and on point. The moderator should thoroughly understand the objective of the meeting, should ensure adherence to the time schedule, should not allow the agenda to be hijacked by either panelists or audience members, should be able to insert questions or topics to keep the meeting moving as necessary, and, in the case of our model agenda, should be skilled enough to achieve a consensus among the key stakeholders on a definitive path forward. While chapter leaders or policy experts may be highly knowledgeable of the subject matter and familiar with all the key players involved, chapters should ensure they possess strong communication and facilitation skills before considering them as candidates for moderator. Other potential moderator candidates include professional meeting facilitators, experienced academicians or news reporters. Securing a television news anchor or health reporter to serve as moderator can help ensure media coverage of the town hall meeting from the moderator’s news outlet (although it will also strongly discourage media coverage from competing news organizations.) However, the skills that make a good news anchor or reporter are not the same as those that make a good moderator. If chapters are interested in approaching a local journalist about serving as moderator, they should first ensure that the reporter is comfortable and capable in the role, fully understands the objective of the meeting, and possesses a basic knowledge of the issue or a willingness to learn more about the subject in advance of the meeting.

**Panelists and Speakers:** The choice of panelists and speakers will necessarily be dependent upon the particular issue that is being discussed. In general, chapters should try to include panelists who are high-level decision makers from three or four critical stakeholder organizations or agencies. They should be extremely familiar with the issue and possess a unique and important perspective that will aid in the discussion of the problem, its impacts and possible solutions. Examples of potential panelists include a leading executive from the state medical society, other specialty societies, the hospital association, patient or public safety organizations, or other organizations that are directly impacted by the issue and have a significant stake in its resolution. Of course, an informed and articulate representative of your chapter should certainly be included as a panelist.

**Panelists and Speakers – Opposition Groups:** If the issue to be discussed is highly contentious, such as liability reform, chapters should consider the advisability of including a representative from one or more organizations that champion positions that are opposed to those of the chapter. Generally speaking, the meeting will have much more credibility with the media, the public and policymakers if it includes representatives of various points of view. However, by giving a voice to opponents of the chapter’s desired course of action, the meeting could easily devolve into a non-productive rehashing of hardened positions. While it would be naïve to expect strong opponents to “see the light” and come to accept the chapter’s position as a result of the meeting, there are steps that the chapter can take to include opposing views and still execute a productive meeting that assists its advocacy efforts.

1. Seek the most reasonable opponents: Whenever possible, seek opponents whose organizations are more moderate in their positions or individuals whose opposition has proven to be more reasoned and practical and who are more likely to participate in a manner that is consistent with the spirit and purpose of the meeting. Work to avoid hard-line activists who are likely to be focused solely on derailing your efforts.
2. Maintain the focus on the issue and its impacts as it uniquely relates to emergency care: For example, if your town hall meeting is on liability concerns, ensure that you limit the discussion of the issue to its impact on emergency care. Try to avoid the standard arguments and talking points that have stymied action on comprehensive medical liability

- reform. Instead of discussing issues such as the increase in liability cases or why liability rates are increasing, focus the discussion on how emergency care is affected (such as the impact on the availability of on-call specialists) and the unique high-risk nature of emergency care that makes it worthy of special consideration under a state's liability law. By controlling the agenda, and remaining focused on emergency care, you can better avoid a rehash of your opponent's standard talking points.
3. Focus on finding creative solutions, not the same old arguments: In this liability reform example, you may live in a state where the political leadership is solidly opposed to enacting caps on damages. When discussing possible solutions to the problem, instead of insisting on a proposal that has no realistic chance of adoption, offer other potential approaches that are consistent with the chapter's goals (health courts, pre-trial screening panels, higher standards of negligence). Showing a willingness to consider new approaches puts pressure on the opposition to demonstrate a similar openness.

**Panelists and Speakers – Policymakers:** Officials from appropriate state agencies or key legislators, such as chairs of relevant legislative committees, may also be very effective panelists. Their participation in the town hall meeting will be extremely beneficial in most cases in order to help enhance governmental awareness and support for efforts to resolve the issue. Policymakers should definitely be included as part of the town hall program, but chapters should consider the proper role they should play and work to ensure that they are not overshadowed by other panelists. While other stakeholder panelists may engage in an in-depth discussion of the issue, a policymaker may lack that depth of knowledge and may look out of place or uninformed. It is critical that the program is set up to avoid such a scenario and to ensure that the policymaker can be confident that his/her participation will be a positive experience that showcases his/her concern about the issue and desire to find a solution to the problem. To help define the proper role of the policymaker in the town hall meeting, chapters can consider a variety of options including:

1. Include the policymaker on the panel. This may be the appropriate assignment if the government official is very well versed on the issue. Even so, arrangements should be made with the moderator to ask appropriate questions of the policymaker to ensure that he/she provides a valuable contribution to the panel discussion. If other panelists are engaged in a discussion of the details of a problem, the moderator should ask a relevant question of the policymaker that is within his/her area of expertise. The moderator should be provided with some questions that would be appropriate for the policymaker and still germane to the specific topic so as not to disrupt the flow of the discussion. The policymaker should be notified in advance of the general topic areas that he/she will be asked to address in order to increase his/her comfort level in participating on the panel.
2. Change panelists during the break. If you break your town hall meeting into two sections...one dealing with a discussion of the problem and the other focused on potential solutions...you may consider changing one or more panelists during the break. While the policymaker may not be the best panelist to discuss the details of an emergency health care problem, he/she may be the ideal panelist to talk about potential solutions. Similarly, another panelist who may have much to offer on the details of the problem may not be equipped or comfortable in promoting specific solutions. Chapters could consider changing some of the panelists when the topic shifts, or the panel could be expanded to include the policymaker at the appropriate time.
3. Utilize the policymaker as a speaker instead of a panelist. The policymaker may be more comfortable with, or better suited to, the role of a guest speaker than that of a panelist. The policymaker may be placed on the agenda to speak briefly on past efforts to address the issue, political concerns that must be addressed, or other relevant topics that could help lead into further discussion from the panel. If the policymaker's knowledge of the

issue is limited, this format may better allow him/her to show interest and support in solving the issue without exposing his/her shortcomings.

Of course, you may want to have more than one policymaker participate in your town hall meeting and you can use any combination of the above options to include them. However, chapters should be conscious of political sensibilities and work to avoid a situation where an elected official may feel slighted because his/her role was not as significant as another official in a similar or lesser governmental position. If such a disparity of roles is unavoidable, chapters should ensure that the officials are aware of the different roles in advance, and the reasons for it, in order to avoid any hurt feelings or negative ramifications.

All panelists should be informed in advance of how the program will be structured, the different topics that will be discussed and the time allotted for each discussion so they can prepare appropriately. In inviting potential panelists, chapters should let them know that the purpose of the meeting is to draw the attention of policymakers, the media and the public to the issue and to advance advocacy efforts for solving the problem. If high level stakeholders perceive that this will be a significant event that may have an impact on how a key issue will be resolved, they will likely want to participate in order to ensure that their perspective and input is considered.

**Special Guests:** In addition to an effective moderator and appropriate high-level panelists/speakers, chapters should consider whether there are other potential speakers or attendees who could add to the effectiveness of the town hall meeting. A willing patient who has been impacted by the issue can be highly effective in conveying the human impact of the issue (and can be extremely helpful in generating media interest.) Perhaps a physician can relate his/her personal experiences of how the issue has threatened quality patient care. The town hall meeting is an ideal venue for humanizing an issue in a way that helps enhance media interest, public sympathy and government activity.

Chapters should also strongly consider inviting the governor to participate and provide some opening remarks. While it may be overly optimistic to expect the governor to take part, the invitation alone serves as a way of informing the governor about the issue and the depth of the chapter's resolve to ensure that the issue is addressed. Chapters may also consider other high-profile individuals to provide welcoming remarks, including their U.S. senators or representatives, which can help draw additional media and public interest to the meeting.

Beyond those policymakers who are invited to participate in the program, chapters should consider extending special invitations to a wide variety of government officials who may have an interest in the issue or possess some relevant oversight responsibilities. This could include state and federal legislators who represent the district where the meeting will be held, state legislators who serve on any relevant committees or who hold leadership positions, and key staff members in appropriate legislative offices, regulatory agencies or government departments. Time should be set aside at the beginning of the agenda to recognize all elected or high-level policymakers in attendance.

**Other Invitees:** To ensure adequate attendance at your town hall meeting, chapters should develop a list of organizations and individuals that should be invited to attend. In developing this list, chapters should consider the universe of stakeholders that make up the "community" that is most likely to be interested in, and impacted by, the topic to be discussed. Depending upon the seating capacity of your selected venue, you may want to specifically invite only board members or other leaders of these stakeholder organizations, or encourage them to promote the meeting to their entire membership through announcements in newsletters or other communication vehicles.

Chapters may want to include a request for an RSVP from the invitees to help determine likely attendance at the meeting.

**Invitation Timetable:** As mentioned earlier, invitations to all speakers and panelists should be extended as soon as possible. Chapters may want to contact the most critical participants personally before setting the date for the meeting, in order to gauge their willingness to participate and to identify any dates that may pose a conflict for the speakers. Other potential speakers, who may be adequately replaced by others in their organization, as well as all policymakers, should be invited as soon as the date and location are set. Invitations to stakeholder organizations to attend the meeting should be sent out 1-2 months before the meeting.

## **Selecting the Date and Location for Your Town Hall Meeting**

In selecting a future date for your town hall meeting, chapters should allow a minimum of three months in order to accommodate planning needs and to provide sufficient advance notice to invited speakers. Chapters may also want to select a date and time that does not conflict with other planned major events in the city that could negatively impact participation in the meeting or media coverage of the event. In many cases, holding the town hall meeting on a weekday evening may be preferable as it is less likely to result in scheduling conflicts for speakers and guests, and increases the chances that desired meeting space will be available.

A number of factors must be considered in selecting your meeting space. The first decision will be to determine the city where the meeting will be held. Ideally, the city should be centrally located to make it easily accessible to speakers, panelists, invited guests and the news media. If legislators or other state officials are key participants in the meeting, the state capital may be the preferred venue, especially if the legislature is in session. Otherwise, if the capital is in a smaller city, one of the largest cities in the state may be a more attractive location since it is likely to be more easily accessible to more media outlets.

Selecting the facility itself will be an important decision that can have significant implications, most notably on your chapter's budget. While meeting space at hotels or other prime locations can be costly, chapters should consider other low-cost or free options that can be ideally suited for a meeting of this nature. Large meeting rooms in state office buildings, hospitals, colleges, schools, community centers, or libraries can be excellent venues and can often be reserved at little or no cost. Supportive legislators, government officials or chapter lobbyists can help chapters secure meeting space at the capitol or nearby state office buildings. A hospital auditorium can be an ideal and logical site, especially if the topic to be addressed is also an issue of concern to hospitals and a hospital representative is included as a panelist.

While budgetary concerns may be the overriding factor in selecting the meeting space, other important considerations include the size of the meeting room, the set up of the room, seating capacity, audio/visual capabilities, parking and access to the public. Chapters will want to ensure that there is adequate room to easily accommodate all invited guests and the news media. If chapters intend to publicize the meeting to the general public, they should try to anticipate what kind of interest and response there will be from the public and from citizens affiliated with interested organizations. The capacity of the room will be a key factor in helping chapters plan their promotional efforts. If a very large room is secured, chapters may want to heavily promote the event to the public and other interested organizations to avoid having an excessive number of empty seats. A small gathering in a cavernous auditorium can create an impression that the issue is of little importance.

In selecting the meeting space, chapters should also have a clear understanding with the facility's management about how the room will be set up, who will be responsible for setting up the room; whether microphones will be available for speakers, panelists and audience members; how the audio will be controlled; and whether the stage (or front of the room) will have a lectern for speakers and a table for panelists.

### **Engaging in an Effective Media Outreach Effort**

Engaging the news media to cover a meeting will require creating a strong news hook focused on your town hall meeting topic. If the topic is an issue that has already generated a lot of public interest, the media will be more likely to cover the event.

It is important to remember the goal of the town hall meeting is to secure increased attention on the issue, not necessarily on the meeting itself. With that in mind, an effective media plan should begin with an effort to get the media engaged in covering the issue in advance of the town hall meeting. Securing coverage about the issue before the meeting will serve the dual purpose of raising awareness of the issue and generating interest in the town hall meeting. Chapters can also use the scheduling of the town hall meeting to further demonstrate to the media that the issue warrants coverage. Showing that high-level representatives from influential public and private institutions are coming together to discuss the problem should help convince reporters of the seriousness of the issue.

Chapters should begin developing their media outreach plan early in their planning process. The plan ideally should consist of:

- Develop story ideas to pitch to the media. Consider possible story ideas related to the issue. Several weeks before the meeting, chapters should use an ACEP-provided media list to contact health and medical reporters to pitch stories about the issue and to provide a media advisory with the details of the meeting. Contact information for chapter spokespersons should also be provided.
- Identify chapter spokespersons. Select and train members who can serve as media spokespersons on the issue, and have their names and contact information ready to supply to the media. Where appropriate, enlist their help in working with hospitals to set up visits by reporters to emergency departments to get a first-hand look at the issue.
- Customize talking points. Use and tailor national ACEP talking points (available on the ACEP web site) to fit state-specific chapter needs and provide them to all spokespersons. Develop key messages that outline the issue, its severity and impact on the community.
- Identify potential partners. Prepare a list of other organizations with a vested interest in the issue that might be good contacts for reporters.
- Prepare editorials. Draft and have spokespersons submit editorials to newspapers leading up to and after the town hall meeting.
- Provide desk-side briefings. Enlist spokespersons to contact editors of local papers to seek a desk-side briefing about the issue before and/or after the event.
- Create a press kit. Chapters also should develop a press kit to distribute at the event. A press kit can contain a press release, ACEP public education materials (visit ACEP's web site to see what is available and contact ACEP's public relations office to obtain materials/press kit folders), news articles and data.

ACEP's public relations office is available to assist chapters in preparing media outreach plans, media advisories, and press kits.

Even if reporters decline to cover the issue prior to the town hall meeting, they should still be alerted about the meeting through a follow-up media advisory released about two weeks before the meeting date. The advisory should contain all the details about the meeting and should include additional information about the issue and its impact on the community. Reporters who declined to cover the issue earlier may be more inclined to cover the meeting, thanks to their previous interaction with the chapter and their increased awareness of the issue. If newspaper reporters fail to provide advance coverage of the issue, a letter to the editor focused on the importance of the issue and mentioning the upcoming town hall meeting can be another way to promote the event. A post-meeting letter-to-the-editor focused on the issue and the results of the meeting can be equally effective, regardless of whether the newspaper covered the meeting.

Chapter leaders also should seek to cultivate relationships with the reporters who cover the meeting, offering to work with them to help produce follow-up stories on the issue.

Keep in mind the purpose of this project is to mobilize public support about the issue and advance your advocacy agenda. Chapters are encouraged to work with the national ACEP public relations office to develop and execute a comprehensive media outreach strategy to obtain coverage before, during and after the event.

### **Other Promotional Efforts**

In addition to aggressively working with reporters to obtain news coverage, chapters may want to consider other efforts to invite the public to the town hall meeting. Depending on the likelihood of public interest and the space available at the meeting site, chapters can consider sending meeting notices to newspapers, and radio and television stations. These media outlets often print or broadcast such announcements, but chapters should first contact them to see what guidelines they require and how far in advance they will accept submissions. Chapters can also produce and post flyers with information on the meeting on bulletin boards in local hospitals, government offices and grocery stores. They may also send meeting announcements to organizations that may have an interest in the issue.

### **Meeting Day Preparations and Responsibilities**

In the days leading up to the meeting, chapters should contact invited speakers, panelists and the moderator to ensure that there are no outstanding issues and that everyone understands their role and responsibilities. Management of the facility where the meeting will be held should also be contacted to reconfirm the arrangements. On the day of the meeting, it would be advisable for a chapter representative to go to the facility several hours before the event to ensure that the room set up and a/v requirements are consistent with the agreed-upon plan. Materials that may be needed for the meeting include copies of the agenda, a sign-in sheet, name tags, and copies of any handouts related to the issue. A registration and literature table(s) should be set up at the entrance of the room. If refreshments are planned, an area of the room or an adjacent room should be set up with sufficient tables.

Volunteers will be needed at the meeting to handle various responsibilities that may include greeting and registering visitors, greeting and interacting with invited guests, working with the media, greeting and instructing speakers/panelists/moderator, serving refreshments, and keeping time during the meeting to assist the moderator in staying on schedule.

## **Meeting Follow-Up**

Actions taken in the aftermath of the meeting can be critically important in helping to keep the issue on the minds of the media, the public, stakeholders and policymakers. In addition to the letter to the editor mentioned earlier, chapters may consider sending thank you letters to participants that reconfirm the next steps discussed at the meeting. Additionally, chapters may want to develop a summary report from the town hall meeting, including topics of discussion and next steps, and supplying copies of the report to legislators, other state officials and key stakeholders. If those next steps included a recommendation to request the establishment of a formal governor's task force or other body to further study the issue, chapters should initiate that process. If the next steps are only to continue talking, chapters should begin making plans on how best to facilitate further discussions and maintain communications with key stakeholders in developing and executing those plans.



## **Sample Town Hall Planning Checklist**

### **At Least Three Months Before Meeting**

- Identify Project Coordinator
- Appoint Planning Task Force
- Determine Objective and Scope of the Meeting
- Determine Desired Range of Dates for the Meeting
- Identify Desired Speakers/Panelists/Moderator (and back-ups)
- Identify Special Guests to Be Invited
- Invite Key Speakers/Panelists/Moderator to Participate (Check for dates of availability)
- Investigate Available and Acceptable Meeting Venues

### **Two – Three Months Before Meeting:**

- Determine Date
- Confirm All Speakers
- Reserve Meeting Space
- Send Invitations to Special Guests
- Begin Planning Media Outreach Effort (Develop story ideas and identify contacts)

### **Final Month Before Meeting:**

- Pitch Issue-Related Story Ideas to the News Media
- Send Invitations to Stakeholder Organizations and Other Potential Audiences
- Identify Needed Volunteers to Coordinate Activities at the Meeting

- Send Meeting Announcements to Local News Outlets
- Print and Post Meeting Announcement Flyers
- Develop/Print Meeting Materials (sing-in sheets, agenda/program, etc.)
- Reconfirm Meeting Site Arrangements
- Reconfirm Speakers

### **Meeting Day:**

- Inspect Meeting Site
- Purchase/Deliver Refreshments
- Volunteer Meeting Coordinators Arrive
- Meeting is Held
- Facilitate Post-Meeting Media Interviews
- Clean Up Meeting Site

### **After the Meeting:**

- Thank You Letters to Participants
- Letter to the Editor
- Develop Summary Report and Deliver to Policymakers/Stakeholders
- Facilitate Next Steps