

## Preparing for Successful Public Meetings: Checklist for Before, During, and After

These are general suggestions. Formal board, commission or council meetings will have additional and more technical preparation requirements.

### Before the Meeting

#### The Issue

- Develop a clear statement about the topic and how it might affect the public.
- Set clear expectations about the purpose of the meeting and intended outcomes.
- Create an agenda with estimated times, and whether an item is information, review or a decision.

#### Outreach

- Identify which types of community members you hope will attend.
- In addition to advisory boards and task forces, speak to leaders from a wide range of groups (such as school, business, faith-based, health and neighborhood groups).
- Send out an e-blast; issue a press release; post to blogs.
- Use social media to announce the meeting and invite people. Include directions, transit routes and suggestions about parking.
- Reach out to the community; talk to people one on one and to groups at *their* meetings.
- Translate outreach materials as needed and share with appropriate community groups.

#### Logistics

- If you have flexibility, choose a time of day that is convenient for those you are trying to include.
- Make sure the facility and equipment are suited to your intended purpose and audience.

- Determine if special accommodations are warranted (for example, food, childcare, translation services or devices).

### Information

- Educate oneself and staff about the topic ahead of time.
- Line up subject matter experts as needed; explain the need to translate technical information into plain language that everyone can understand.
- Make information available to the public before the meeting, in a variety of formats including online and via community outreach.
- Invite questions ahead of time.
- Determine application of open meeting laws and assure compliance.

### During the Meeting

#### Explaining the Process

- Be clear who is running the meeting.
- Define the goal of the meeting, key topics and what decisions will or will not be made.
- Introduce all public officials.
- Explain the meeting process, when it is the public's turn and time restrictions (and the reasons for the time restrictions).
- Clarify how comments will get recorded and used.

#### Information Sharing

- Have high quality visual aids and adequate handouts.
- Keep explanations as simple as possible and avoid acronyms and technical terms.

*Continued on next page*

## Managing the Discussion

- Set a friendly tone.
- Be attentive and use active listening skills.
- Explain what plan/process the agency is using to determine what is on topic and off topic.
- Capture off topic comments to be addressed at a different time.
- Be honest about what the agency can and cannot do; define parameters.
- Solicit comments from those not heard, using direct invitation, such as a “last call” or cards requesting written comments.

## Creating a Welcoming Environment

- Provide food (ideally multi-ethnic to match your community’s preferences).
- Offer name tags and sign-in sheets; collect emails for follow-up (keeping in mind that it is optional for attendees to provide their names and contact information).
- Express appreciation to all attendees.
- Provide an anonymous feedback form to all attendees to learn what worked well and what can be improved for next time.

## After the Meeting

- Prepare and post a meeting summary.
- Send out an “e-blast” about decisions, action items, next steps and any follow-up meetings; provide a specific contact person.
- Reach out to attendees who did not speak up during the meeting (they may care just as much but may be introverts).
- Follow up with those who might be disappointed with the decision; encourage them to stay involved.
- Keep asking for feedback and continue to provide information about the issue.
- Apply the evaluation to the next public process.

“Before the meeting, educate the public. During the meeting, educate the public. After the meeting, keep educating the public.”

- Advice shared by a County Supervisor at a  
CSAC Institute Training

### Resources Available through the Institute

The Institute’s Meeting Resource Center aims to help local officials and agency staff make the most of meeting time. [www.ca-ilg.org/meeting-resource-center](http://www.ca-ilg.org/meeting-resource-center)

### About the Institute for Local Government

This checklist is a service of the Institute for Local Government (ILG) whose mission is to promote good government at the local level with practical, impartial and easy-to-use resources for California communities.

ILG is the nonprofit 501(c)(3) research and education affiliate of the League of California Cities and the California State Association of Counties. For more information and to access the Institute’s resources on local government 101 and public engagement, visit [www.ca-ilg.org/local-government-101](http://www.ca-ilg.org/local-government-101) and [www.ca-ilg.org/engagement](http://www.ca-ilg.org/engagement). To access this resource directly, go to [www.ca-ilg.org/ PublicMeetingPrepChecklist](http://www.ca-ilg.org/PublicMeetingPrepChecklist).

The Institute welcomes feedback and suggestions for improving this resource:

- *Email:* [publicengagement@ca-ilg.org](mailto:publicengagement@ca-ilg.org) Subject: *Preparing for Successful Public Meetings: Checklist for Before, During and After*
- *Mail:* 400 K Street, Suite 205 ▪ Sacramento, CA ▪ 95814

G:\INSTITUTE\PublicEngagement\Publications\Meeting Checklist\ Meeting Preparation Checklist\_FINAL.pdf