Meeting Plan  
Template

# Purpose

This tool supports City government practitioners in creating a meeting plan. To learn more, review the Community Meetings guide at [engagement-toolkit.phila.gov](http://www.phila.gov/engagement-toolkit).

# Instructions

Set aside 30 minutes to review and revise the template meeting plan. Find a comfortable space to think and prepare to sit with questions about your engagement.

## About this engagement

Draft a brief description of your engagement.

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| *Example: The goal of this engagement is to share information about the City’s new summer reading program. The program is led by a team of collaborators from the Free Library of Philadelphia and Philadelphia Parks & Recreation.* |

## Level of engagement

Select the level of engagement that best describes the amount of shared decision making power in your meeting.

* **Inform:** Meetings in this level disseminate information about City government’s decisions.
* **Consult:** Meetings in this level disseminate information about City government’s decisions and collect community input on them.
* **Collaborate:** Meetings in this level facilitate collaborative decision making among City government and community members.
* **Community-owned:** Meetings in this level invite community members to make decisions on behalf of City government.

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| *Example: Since this meeting is meant to disseminate information about the new summer reading program, we’re working within the Inform level of engagement. Meaning, we’re not sharing decision making power with the community members participating in our meeting.* |

## Goals

Draft the goals for your meeting.

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| *Example: The goal of our meeting is to disseminate information about the new summer reading program. More specifically, we aim to:*     * *Communicate what the program is and why it’s important.* * *Communicate when the program begins and ends.* * *Communicate the benefits of participating in the program.* * *Communicate how and where to participate in the program.* * *Answer any questions from community members about the program.* |

## Agenda

Draft an agenda that allows you to accomplish your goals for the meeting.

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| **Time** | **Agenda Item** | **Lead** |
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| *Example:* | | |
| ***Time*** | ***Agenda Item*** | ***Lead*** |
| *5 minutes* | *Welcome*   * *Perry will play music and share their screen as community members arrive.* * *Lei will welcome community members as they arrive.* * *Lei will kick us off 5 minutes into our meeting to allow extra time for community members to settle in.* | *Lei* |
| *5 minutes* | *Introducing facilitators*   * *Lei will introduce themself first with a physical description and their pronouns.* * *Angelina will introduce themself second.* * *Javier will introduce themself third.* | *Lei, Angelina, Javier* |
| *15 minutes* | *Overview of the program*   * *Introduce the City agencies leading the program.* * *Introduce what the program is.* * *Introduce why the program is important for City government and community members.* | *Javier* |
| *5 minutes* | *Pause for questions*   * *Lei will read community members’ questions from the chat.* * *Angelina and Javier will respond to questions, with support from Lei as needed.* | *Lei* |
| *30 minutes* | *Getting involved in the program*   * *Introduce the benefits of participating in the program, including incentives for recruiting other participants.* * *Introduce how to participate in the program, including application processes and eligibility requirements.* * *Communicate where to participate in the program, including participating libraries and recreation centers.* * *Introduce when the program will begin and end, including the deadline to apply.* | *Angelina* |
| *10 minutes* | *Pause for questions*   * *Lei will read community members’ questions from the chat.* * *Angelina and Javier will respond to questions, with support from Lei as needed.* | *Lei* |
| *5 minutes* | *Next steps*   * *Lei will invite community members to apply to participate in the program.* * *Perry will share the link to the application in the chat.* | *Lei* |

## Format

Determine the format of your meeting, including the date, time, and location.

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| *Example: This meeting takes place:*     * ***Date:*** *Thursday, December 1st* * ***Time:*** *6:00-7:15 pm* * ***Location:*** *Virtually via Zoom Webinar* |

## Materials

Determine the materials needed to facilitate your meeting.

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| *Example: Before this meeting, we need to prepare:*     * *A presentation and talking points that follow our agenda.* * *A program application to invite community members into our work.* * *Music to play at the beginning of the meeting.* |

## Accommodations

Determine the accommodations you need to provide in your meeting.

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| *Example: Before this meeting, we need to prepare language access accommodations. Specifically, we’ll:*     * *Host the meeting with Mandarin and Spanish interpretation. Beforehand, we’ll need to test interpretation channels in Zoom, so that community members can select their preferred language.* * *Provide translated materials in Mandarin and Spanish. We’ll need to prepare materials in English at least two weeks before the meeting, so that we have enough time to translate them.* * *Record the meeting. Afterward, we’ll transcribe the recording and translate it into Mandarin and Spanish, as well as French, Russian, and Vietnamese. We’ll post the meeting transcription and program application on the Free Library of Philadelphia and Philadelphia Parks & Recreation websites.* * *Turn on closed captions. Beforehand, we’ll need to ensure that closed captions are turned on in Zoom.* |

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## Roles

Determine the roles needed to facilitate your meeting.

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| *Example: Five collaborators from the Free Library of Philadelphia and Philadelphia Parks & Recreation will work together to host this meeting.*     * ***Chair, timekeeper:*** *Lei Employee, Free Library of Philadelphia* * ***Facilitators:*** *Angelina Employee, Free Library of Philadelphia and Javier Employee, Philadelphia Parks & Recreation* * ***Access guide, note taker:*** *Amir Employee, Free Library of Philadelphia* * ***Tech support:*** *Perry Employee, Philadelphia Parks & Recreation*     *Since Amir is serving as our access guide, we’ll share their contact information before the meeting, so that community members can request access accommodations. Since Perry is serving as our tech support, we’ll share their contact information before the meeting, so that community members can request technical support.* |

## Recruitment

Determine your recruitment and confirmation plans for your meeting.

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| *Example: To recruit community members to attend this meeting, we’ll:*   * *Place flyers and posters at participating libraries and recreation centers.* * *Post about it on the Free Library of Philadelphia and Philadelphia Parks & Recreation social media accounts.* * *Send an invitation through Friends of the Library and Friends of the Park email lists for participating libraries and recreation centers.*     *To confirm community members to attend this meeting, we’ll:*   * *Send a reminder email to registered community members one week beforehand.* * *Send a reminder text message to registered community members one day beforehand.* |