# Public Meeting Plan Checklist

**For more information on public meeting templates, guidance documents, and examples, please refer to INDOT’s Public Involvement Toolbox website.**

Des/ Contract #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Project Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| --- | --- | --- | --- | --- | --- |
| **MEETING DETAILS** | | **HANDOUTS/DISPLAYS/EXHIBITS** | | **SUPPLIES/OTHER ITEMS** | |
| Date: | |  | Agenda |  | Signs |
| Time: | |  | Sign-in Sheet |  | Pens |
| Presentation Time: | |  | Project Mapping w/Construction Limits, Alternative(s), & Impacts Clearly Defined |  | Tape |
|  | Project History/Purpose & Need |  | Easels |
| **MEETING FORMAT** | |  | Project Description |  | Name Badges |
|  | Open House |  | Right-of-Way Plan Sheets (Aerial w/parcel lines) |  | Table Cover |
|  | Open House with formal presentation/open mic |  | Design Plans |  | Comment Box |
|  | Workshop |  | Environmental Resources (Noise, Section 106, Section 4(f), etc.) |  | Wayfinding Signs (Outdoor & Indoor) |
|  | Focus Group |  | Impacts Matrix |  | P/A System Equipment |
|  | Public Hearing |  | Comment Form |  | Extension Cords |
|  |  |  | Sign-up for project e-mail updates/newsletters |  | Batteries |
| **MEETING PLATFORM** | |  | NEPA Assignment Poster/Brochures |  | Coloring Pages/Crayons |
|  | Online/Virtual |  | Consulting Party Applications (if applicable) |  | Model Cars/Trucks/Farm Implements |
|  | In-Person |  | Open Microphone Registration (if applicable) & Guidelines/ Ground Rules |  | Laptops/Tablets |
|  | Hybrid |  | Project Manager Business Cards |  | Virtual Reality Equipment |
|  |  |  | Existing & Future Conditions Picture(s)/Artist Rendering(s) |  |  |
| **IN-PERSON VENUE DETAILS** | |  | Project Timeline | **Notes**: | |
|  | Facility Checklist Completed |  | Decision-Making Process chart that shows next steps |
| Venue Name: | |  | Project Brochure/Handout |
| **Notes**: | |
| Address: | |
| Reserved Times: | |
| **NOTIFICATION METHODS** | | **DOCUMENTS** | | **OTHER PI ACTIVITIES** | |
|  | Public Notification Letter |  | Technical Reports |  | Stakeholder Consultation |
|  | Stakeholder Notification/Invitation |  | Environmental Reports |  | Stakeholder Meetings |
|  | News Release |  | Environmental Document |  | Workshops |
|  | Newspaper Advertisement |  | Alternatives Evaluation Report |  | Focus Groups |
|  | Newsletter |  | Feasibility Study |  | Media Presentations |
|  | Mail Insert |  | Traffic Study |  | Resource-Specific PI (Noise, Section 106, etc.) |
|  | Flier |  | Safety Study | **Notes:** | |
|  | Project Website | **Notes:** | |
|  | Social Media |
|  | Email Notification |
|  | Other |
| **Notes**: | |

# Project Management Team Roles/Responsibilities

**STRATEGY MEETING**

**6-12 Months Prior to Meeting**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Done** | **To-Do** | **Notes and Template/Guidance Location** | **Assigned To** | **Due Date** |
|  | Consult Public Engagement Plan and project team to confirm the purpose and goals of the meeting |  |  |  |
|  | Determine meeting platform | In-Person, Virtual, Hybrid |  |  |
|  | Determine meeting format | Formal, Open House, Virtual, Pop Up, Other |  |  |
|  | Develop meeting agenda |  |  |  |
|  | Assign project management team roles and responsibilities and establish due dates for all items |  |  |  |
|  | Determine meeting materials needed |  |  |  |
|  | Determine notification methods |  |  |  |
|  | Determine all stakeholders to be invited (outside of project team) |  |  |  |
|  | Determine extra efforts needed to involve Underserved Populations (if applicable) |  |  |  |
|  | Meet with Legislative Services if project will require more political awareness than standard meetings |  |  |  |

**3-4 Months Prior to Meeting**

| **Done** | **To-Do** | **Notes and Template/Guidance Location** | **Assigned To** | **Due Date** |
| --- | --- | --- | --- | --- |
|  | Select and reserve meeting venue using Public Meeting Facility Checklist (if in person)  *OR*  Submit request to use virtual meeting platform | PI Toolbox-Public Meeting or Hearing-Public Meeting-Preparations |  |  |
|  | Determine meeting date(s) and time(s) |  |  |  |
|  | Determine media contacts and deadlines for advertising and notifications |  |  |  |
|  | Draft paid advertisement (if applicable) | PI Toolbox-Paid Advertisement |  |  |
|  | Finalize legal notices (if applicable, i.e., EA/EIS) |  |  |  |
|  | Develop mailing list(s) | PI Toolbox-Stakeholders including:   * Property owners (auditor property owner address) * Tenants (auditor property owner address only if there is a building) * Public sector stakeholders * Local officials (Mayor, council members, city/county engineer, township trustees, fire chief, sheriff, police chief, EMS, schools (transportation manager, superintendent), public transportation * Local hospital/medical center/urgent care * Interested organizations |  |  |
|  | Draft invitation letter and distribute for review | PI Toolbox-Public Meeting or Hearing-Public Meeting-Notification  Include:   * Who, what, when, where, why * Statement that meeting material will be posted to the websites (include links) 15 days prior to meeting (provide date) * Project location map * ADA statement * MOT/detour information |  |  |
|  | Draft Meeting Announcement Flier & Cover Letter | PI Toolbox-Public Meeting or Hearing-Public Meeting-Notification   * Cover letter should explain that we are requesting the flier be shared by being posted in public location and/or discussed * Flier should be abbreviated bullet point version of letter |  |  |
|  | Draft List of Flier Posting Locations | Hand deliver, if possible for posting at places of worship, community centers, park boards, businesses, laundromats, restaurants, grocery stores, community bulletin boards, college campus boards, etc. |  |  |
|  | Draft News Release, Website & Social Media Postings | PI Toolbox-Public Notifications-News Release |  |  |
|  | Draft meeting materials and distribute for review | D2 and higher project materials must be submitted 90 days prior to meeting |  |  |
|  | * Draft Comment Form | PI Toolbox-Public Comments  Include room for and/or list of options (colors, railing, patterns, etc.) we want feedback for |  |  |
|  | * Draft Sign-in Sheet | PI Toolbox-Public Meeting or Hearing-Public Meeting-Sign-In Sheet |  |  |
|  | * Draft Handouts | PI Toolbox-Public Meeting or Hearing-Public Meeting-Handouts  Include:   * Who, what, when, where, why * Statement that meeting material will be posted to the websites (include links) 15 days prior to meeting (provide date) * Project location map * ADA statement * MOT/detour information * Floodplain impacts, if any * Section 4(f) impacts, if any * Cultural Resources impacts, if any * Ecological impacts, if any * Include graphics/diagrams/images of proposed * Include information regarding options we want the public to consider * Can be 8.5x11 double-sided or 11x17 folded |  |  |
|  | * Draft Exhibits | PI Toolbox-Public Meeting or Hearing-Public Meeting-Exhibits  1 – Aerial plan view with parcel lines, construction limits, right-of-way, and environmental impacts clearly identified  2 – Cross section with lanes, bike path, sidewalks, etc.  3 – Rendering with aesthetic options  4 – Environmental resources  5 – Detour exhibit  6 – Others? |  |  |
|  | * Draft presentation | PI Toolbox-Public Meeting or Hearing-Public Meeting-Presentation |  |  |
|  | Determine meeting room layout | PI Toolbox-Public Meeting or Hearing-Public Meeting-Preparation (Room layout examples: sign-in/registration at entrance, tell the project story, comment table near exit) |  |  |
|  | Select/Hire a Facilitator |  |  |  |
|  | Select Presenter(s) |  |  |  |
|  | Select Note Taker or Schedule Court Recorder (if applicable) |  |  |  |

**1 Month Prior to Meeting**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Done** | **To-Do** | **Notes and Template/Guidance Location** | **Assigned To** | **Due Date** |
|  | Issue News Release & Social Media Postings | PI Toolbox-Public Notifications |  |  |
|  | Post Exhibits, Handouts, Comment Form on Website | PI Toolbox-Public Notifications |  |  |
|  | Mail Invitation Letters |  |  |  |
|  | Post/Distribute Fliers | PI Toolbox-Fliers |  |  |
|  | Publish paid advertisement |  |  |  |

**2 Weeks Prior to Meeting**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Done** | **To-Do** | **Notes and Template/Guidance Location** | **Assigned To** | **Due Date** |
|  | Finalize meeting agenda |  |  |  |
|  | Finalize displays/exhibits |  |  |  |
|  | Conduct a dry run | Present information to others and try to anticipate needs of audience/possible scenarios, ensure technology works and everyone can connect and is comfortable |  |  |
|  | Reserve vehicle(s) |  |  |  |
|  | Issue Follow-up News Release, Website & Social Media Postings | PI Toolbox-Public Notifications |  |  |
|  | Post meeting materials on project website |  |  |  |

**1 Week Prior to Meeting**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Done** | **To-Do** | **Notes and Template/Guidance Location** | **Assigned To** | **Due Date** |
|  | Print materials |  |  |  |
|  | Gather supplies |  |  |  |
|  | Prepare media kit | PI Toolbox-Media Coverage-Media Kit |  |  |
|  | Publish follow-up paid advertisement |  |  |  |

**Day of In-Person Meeting**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Done** | **To-Do** | **Notes and Template/Guidance Location** | **Assigned To** | **Due Date** |
|  | Dress appropriately | Business casual |  |  |
|  | Arrive early |  |  |  |
|  | Place Wayfinding Signage |  |  |  |
|  | Bring Handouts, Comment Forms, & NEPA Assignment Poster or Brochures |  |  |  |
|  | Bring & Distribute Name Tags |  |  |  |
|  | Bring & Place Exhibits | Room set-up should be complete 1 hour prior to meeting |  |  |
|  | Set-Up Welcome/Registration Table w/pens, box, etc. |  |  |  |
|  | Test audio-visual equipment | Complete 1 hour prior to meeting |  |  |
|  | Brief project management team (review assignments and talking points, be enthusiastic & knowledgeable, watch for VIPs) | 30-60 minutes prior to meeting |  |  |
| **Done** | **To-Do** | **Notes and Template/Guidance Location** | **Assigned To** | **Due Date** |
|  | Have media kit available |  |  |  |
|  | Be flexible but execute the plan |  |  |  |
|  | Make note of follow-up questions you cannot answer (Okay to say I need to investigate that and get back to you) |  |  |  |
|  | Ensure stations are staffed: |  |  |  |
|  | * Welcome/Registration Table Staffing |  |  |  |
|  | * Exhibit/Display Station Staffing |  |  |  |
|  | * Exhibit/Display Station Staffing |  |  |  |
|  | * Exhibit/Display Station Staffing |  |  |  |
|  | * Exhibit/Display Station Staffing |  |  |  |
|  | * Exhibit/Display Station Staffing |  |  |  |
|  | * Exhibit/Display Station Staffing |  |  |  |
|  | * Exhibit/Display Station Staffing |  |  |  |
|  | * Facilitator |  |  |  |
|  | * Presenter(s)/Speaker(s) |  |  |  |
|  | * Q&A Panel Participants (if applicable) |  |  |  |
|  | * Note-Taker |  |  |  |
|  | * Comment Table Staffing (if needed) |  |  |  |

**Day of Virtual Meeting**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Done** | **To-Do** | **Notes and Template/Guidance Location** | **Assigned To** | **Due Date** |
|  | Dress appropriately | Business casual |  |  |
|  | Log-in early |  |  |  |
|  | Test audio-visual equipment | 30 minutes prior to meeting |  |  |
|  | Brief project management team (review assignments and talking points, be enthusiastic & knowledgeable) | 30 minutes prior to meeting |  |  |
|  | Be flexible but execute the plan |  |  |  |
|  | Make note of follow-up questions you cannot answer (Okay to say I need to investigate that and get back to you) |  |  |  |
|  | Ensure integral staff are present: |  |  |  |
|  | * Facilitator |  |  |  |
|  | * Presenter(s)/Speaker(s) |  |  |  |
|  | * Subject Matter Expert(s) |  |  |  |
|  | * Note-Taker |  |  |  |

**Meeting Follow-Up**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Done** | **To-Do** | **Notes and Template/Guidance Location** | **Assigned To** | **Due Date** |
|  | Prepare comment responses and public meeting report and circulate for review |  |  |  |
|  | Send/Publish comment responses within 30-60 calendar days after close of comment period |  |  |  |
|  | Upload materials to intranet | PI Toolbox-File Management |  |  |
|  | Update Public Engagement Plan, if necessary | PI Toolbox-Public Engagement Plan |  |  |
|  | Prepare and upload Public Meeting Summary to intranet within 60 calendar days after close of comment period | PI Toolbox-Public Notifications |  |  |