

Master Checklist for Steps in Creating the Container to Achieve Results

ITEM	COMPLETE?
Steps to Complete at Project Launch	
Set meeting date(s)	
Identify meeting staffing	
Get staff contracts in place, if applicable	
Identify members of the Implementation Team and clarify roles	
Reserve meeting space, including the afternoon before the meeting so the room can be set up	
Send "save the date" email to meeting participants	
Post meeting date and purpose on social media forums, if appropriate	
Arrange travel logistics for meeting staff: <ul style="list-style-type: none"> • Research, propose, and purchase flight tickets • Reserve hotel room • Reserve rental car 	
Set up a shared file system, if appropriate	
Set dates for two Co-Design Meetings and final check-in call	
Steps to Complete During Co-Design	
Provide template for participant Composition Analysis	
Send proposed agenda for first Co-Design Meeting with supporting materials, if any	
Hold the first Co-Design Meeting	
Send the draft Annotated Agenda to Implementation Team and the proposed agenda for second Co-Design Meeting	
Hold the second Co-Design Meeting	
Send the final Annotated Agenda and the Proposed Agenda for the final check-in call	

ITEM	COMPLETE?
Hold final check-in call	
Steps to Complete During Participant Preparation	
Send meeting reminder and results to participants	
Send Public Agenda and participant pre-work	
Post meeting update on social media forums, if appropriate	
Order meeting supplies	
Order participant materials	
Prepare participant materials	
Arrange food for the meeting; poll participants for requests, if needed	
Arrange for needed audio-visual equipment	
Steps to Complete During Meeting Execution	
<i>The Afternoon/Evening Before the Meeting:</i>	
Set up the furniture and easels in the meeting room	
Place participant materials on tables	
Hang and/or place data on walls or flip chart stands	
<i>One Hour Before the Meeting:</i>	
Meet with the Implementation Team to review agenda and go over any updates	
<i>During the Meeting:</i>	
Have handouts ready to go so they are easily distributed during the designated meeting slot	
Distribute real-time meeting notes, as needed	

ITEM	COMPLETE?
Organize and/or number flip chart pages for future reference as you go along; perhaps take pictures of the pages	
Replace supplies as needed, such as flip chart paper, dried-out markers, etc.	
Address issues that arise related to meeting process and/or logistics	
Manage “external” issues that concern the group, such as weather reports, traffic problems, etc.	
<i>When the Meeting Ends:</i>	
Break down the meeting room and pack supplies away	
Debrief with Implementation Team	
Steps to Complete During Meeting Follow-Up	
Send action commitments to participants	
Send full meeting summary to participants	
Post meeting results and outcomes on social media forums, if appropriate	
Thank meeting supporters, such as onsite administrative staff	
Hold more in-depth debrief meeting with Implementation Team, if needed	
Schedule follow-up meetings, as applicable	

Master Checklist for Meeting Supplies

PLACEMENT	ITEMS	ORDERED?
On Participant and Implementation Team Tables	• Table Toys - Two per participant	
	• Candy or other snacks	
	• Baskets - One each for table toys and candy	
	• Mr. Sketch brand large point, chisel-tipped dark markers in contrasting colors (no red, which can signal critique)	
	• Pads of paper	
	• Pens	
	• Name tents (with names printed on both sides)	
	• Self-stick name tags	
	• Journals or note pads, if appropriate	
	• Hand sanitizer	
	• Tissues	
	• Post-it notes - 3x3 Size; one pad per person of different colors	
	• Binders or folders	
	In the Room	• Mr. Sketch brand large point, chisel-tipped dark markers in contrasting colors (no red)
• Blue “painters” tape		
• Post-it Notes - 4x6 size; one pad per person of different colors		
• Scissors		
• Stapler		
• 3-hole punch		
• Paper clips		
• Binder clips		
• Rubber bands		
• Extension cord(s)		
• Power strip(s)		
• Scotch tape		
• Portable printer or access to network printer		
• Self-stick easel pads - One for each flip chart stand plus 2 extra		
• Flip chart stands: One for each table and two up front		
• Books or pamphlets being provided		

Details for Ordering Selected Meeting Supplies

MATERIALS	SOURCE AND/OR DESCRIPTION
Table Toys	http://www.officeplayground.com/Stress-Relievers-C33.aspx Two toys per participant
Name Tents	http://www.avery.com/avery/en_us/Products/Cards/Tent-Cards/Laser-and-Ink-Jet-Tent-Cards_05305.htm Avery or equivalent
Dark Markers	http://www.officemax.com/brands/mr-sketch/product-prod3640290
Self-Stick Easel Pads	http://www.staples.com/Staples-Stickies-25-x-30-Easel-Pads-White-2-Pack/product_573058
Participant Binders	http://www.amazon.com/Avery-Flexi-View-Binders-1-5-Inch-17637/dp/B006TIM1IG