

Community Engagement Event Checklist

The purpose of this checklist is to help guide community engagement events/activities and support members in maximizing effectiveness of engagement initiatives with consistency across the East Toronto Health Partners (ETHP).

The first section is designed to help clarify the goals for the event to ensure all appropriate elements are being considered to make the engagement as effective as possible.

BEFORE YOU START PLANNING YOUR EVENT – CLARIFY YOUR GOALS AND OBJECTIVES

- ✓ **Why do you want to involve patients/providers/others?**
 - What is the purpose of the engagement and what does success look like?
 - Consider if you are requesting engagement for a one-time event or an ongoing commitment

- ✓ **Who do you need to involve?**
 - Have you considered all of the voices at the table and who will be affected by the decisions you make?
 - i.e. patients, clients, families, caregivers, general public, community partners/agencies, primary care, government, etc.

- ✓ **What 'type' of engagement are you looking for?**
 - To share (keep people informed)?
 - To Consult (seek input)?
 - To collaborate (work together on solution)?

- ✓ **When will you involve others?**
 - What are your timelines?
 - Do you have an appropriate location secured? Is it accessible?

- ✓ **How will you engage others?**
 - What type of engagement are you hosting?
 - i.e. round tables, larger or small group, focus groups, one-on-one, information sessions, town halls, etc.

- ✓ **How will you know you've been successful?**
 - What measures have you put in place to evaluate success?

This section is designed to direct the work leading up to the event, during the event and following the event to ensure all details are effectively coordinated to ensure successful engagement.

The timelines below may not be feasible in all cases, but it is still useful to consider all elements in this checklist.

EVENT LOGISTICS

Initial planning phase (typically 2 months before)

ACTIVITY	DEADLINE	RESPONSIBILITY	COMPLETE	NOTES
Decide on event goals & objectives				
Identify intended audience & start creating invitation list (considering if invitation is for one-time event or for ongoing engagement)				
Develop specific questions for the group that are not too broad/ outline what is and is not 'in scope' for the event				
Select date for the event				
Determine venue location				
Determine budget/funding				
Recruit event support & assign responsibilities				
Involve Communications in event for materials & promotion support				
Identify and confirm speakers/presenters				
Identify potential VIPs				

Event logistics (one month before)

ACTIVITY	DEADLINE	RESPONSIBILITY	COMPLETE	NOTES
Recruit volunteers to manage greeting/registration on day of event				
Assign someone to take notes & summarize engagements from event				
Assign someone to take photos at event (on phone will do)				
Order catering if required				
Determine A/V equipment needed and arrange/order				
Finalize venue details/book rooms				
Arrange parking if necessary				
Order signage				
Determine payment, if any, for participants				
Draft invitation and vet it with Chair(s) and/or CEOs as needed (include payment info in invitation if appropriate & indicate if request is for ongoing engagement)				

Vet VIP & government official invitees with Communications & CEOs				
Assign responsibility for sending out invitations and managing RSVPs				
Send out invitations to invitees & VIPs				
Draft event agenda including MC, introductions, closing				
Confirm Land Acknowledgement text, or prepare if necessary and assign responsibility				
Provide direction to speakers/participants about focus of presentations or sessions including any specific questions to be addressed and what is in or out of scope for the engagement session				

Event reminders & follow-ups (2 weeks before)

ACTIVITY	DEADLINE	RESPONSIBILITY	COMPLETE	NOTES
Send reminders to planning team/volunteers and include event updates				
Reminder email to invitees				
Finalize venue/room set up and A/V				
Finalize catering				
Confirm Land Acknowledgement text prepared and event assignment for sharing it; include it in agenda				
Finalize event agenda				
Signage finalized				
Communications outreach to media if appropriate				
Identify and confirm speakers/presenters				
Identify potential VIPs				
Determine logistics for paying participants				

Confirm all final details (1 week before)

ACTIVITY	DEADLINE	RESPONSIBILITY	COMPLETE	NOTES
Speakers & presenters to finalize presentations				
Make copies of speeches, presentations, agenda				
Final agenda to all speakers				
Final numbers & details to caterer				
Brief hosts, greeters, volunteers about responsibilities & timelines				
Confirm details for any government officials, including greeters & protocols				
Communications to finalize media involvement/photo ops				
Confirm participant involvement in photos/video				
Finalize details for paying participants				

Finalize event logistics (2 days before)

ACTIVITY	DEADLINE	RESPONS- IBILITY	COMPLETE	NOTES
Final list of attendees prepared and provided as needed				
Final confirmation of Volunteers and their responsibilities				
Ensure all event materials & supplies (paper/pens, flip chart paper, etc) are prepared and ready				
Purchase water bottles for speakers				
Create 'reserved' signage if needed				
Print consent forms for those involved in photos/videos				

Day of Event

ACTIVITY	DEADLINE	RESPONS- IBILITY	COMPLETE	NOTES
Final check of room setup and AV (test microphones, powerpoint, video, etc)				
Final check with catering				
Place signage including reserved signs on seating if needed				
Make sure copies of instructions, speeches & guest lists are ready				
Put out water bottles for speakers				
Bring consent forms and coordinate participants to be involved in photos/videos (separate/distinguish from others if necessary)				
Ensure notes are being taken to capture engagement/key themes				
Take photos/video during engagement				
Take care of payment to participants (if appropriate)				

Immediately following event

ACTIVITY	DEADLINE	RESPONS- IBILITY	COMPLETE	NOTES
Send thank-you's to speakers, participants and those who supported/helped with the event				
Share photos/video with ETHP Communications				
Note-taker to summarize engagement and key themes and share with event lead				
Event lead to share engagement summary with appropriate OHT leads				

One month after event or sooner

ACTIVITY	DEADLINE	RESPONS- IBILITY	COMPLETE	NOTES
Send update to participants summarizing highlights of event, action items/next steps coming out of event to demonstrate impact of their feedback, opportunities for ongoing engagement and any 'quick wins' or updates following the event				
Make notes in ETHP database regarding attendees if appropriate				