ALL FACETS, ALL PHASES

Getting Started, Growing, Assessing and Evolving

Template: ITAV Analysis Kickoff Meeting Planning Checklists

Goals

1. Plan and carry out a successful ITAV Analysis Kickoff event

Prerequisites

None

Who Should Participate?

Program management (tactical thinkers)

Length

60-90 minutes

Overview

The *It Takes a Village Toolkit* is an adaptable set of tools for practical use in planning and managing sustainability.

The **ITAV Analysis Kickoff** is designed to help determine a program's sustainability status, priorities, and capacity, to then be able to decide which of the activities in the Toolkit would be most helpful to complete.

These checklists will help you plan and carry out a successful ITAV Analysis Kickoff event. Edit the lists as needed to reflect your own program's meeting planning process.

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Template: ITAV Analysis Kickoff Meeting Planning Checklists

General Meeting Information

Meeting title	
Date	
Time	
Location (physical / virtual)	
Purpose / Outcomes *Feel free to add/edit*	• Achieve consensus on program's current sustainability status • Identify and prioritize goals for the ITAV analysis • Identify program staff/stakeholders responsible for moving the analysis forward
Host / Facilitator	
Participants	

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Preparation Checklist

Task	Person Responsible	Date Due
Identify managers of Kickoff process		
Identify potential participants, including facilitators, presenters, attendees, observers, etc.		
Read through Planning Activity: It Takes a Village Analysis Kickoff		
Finalize list of participants and identify facilitator		
Determine meeting environment (physical, virtual, hybrid)		
Invite participants		
Schedule event		
In person: reserve meeting space Virtual: determine virtual platform		
Review resources and templates, customize for program		
In person: identify materials needed Virtual: identify collaboration tools		
Finalize agenda and participant list, share with participants		
Virtual: conduct tech rehearsal		

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Meeting Setup: In-Person

Location	
Supplies	*AV setup* *Dedicated presenter laptop* *Extension cords and cables* *Supplies – whiteboards, flip charts, pens, markers, etc.*
Room setup	*E.g., theater, classroom, rounds, u-shaped* *Confirm any accommodations needed*
Refreshments	*Confirm any restrictions with attendees*
Additional requirements	

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Meeting Setup: Virtual

Meeting link	*Confirm if login or advance signup is necessary*
Virtual collaboration tools	*Confirm if login or advance signup is necessary*
Transcript or Closed Captioning	*Confirm is meeting can be transcribed or captioned* *Confirm intended use of transcript after meeting*
Recording	*Confirm if meeting can be recorded* *Confirm permission to record with attendees* *Confirm intended use of recording after meeting*
Additional requirements	

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Post-Meeting Checklist

Tasks	Complete by Date
Share meeting minutes, recordings, notes, and/or decisions	
Follow up on action items / next steps	
Solicit feedback from participants	