

Sample Protocol for a Town Hall Meeting as Part of a Community Needs Assessment or “Environmental Scan” for Strategic Planning

1. Agree on groundrules, such as the following:
 - Each presenter is asked to provide name, affiliations if any, and topics s/he wants to address.
 - Each presenter has 5 minutes to speak – or individuals have 5 minutes and organizational representatives have 10 minutes.
 - The presenter can provide written material but not more than perhaps 10 pages.
 - If staff and clients from the same organization want to speak, there will be a limit of one staff member and three clients (or whatever) per organization.
 - People who RSVP will be put on a list to speak. People who don't RSVP ahead of time will be allowed to speak in the order in which they sign up at the door (see below).
 - A specified amount of time (30 minutes?) will be set aside at the end for open discussion.

Send these groundrules out ahead where possible – to other religious institutions, shelters, other social service providers, etc. Have them on a flyer at the door at the Town Hall meeting so everyone has one during the meeting.

2. Ask invited people to RSVP if they wish to speak, and to give you their name, affiliation (staff or volunteer, Board, or consumer) and the topic they want to focus on. Indicate that those who RSVP will be heard first, and remaining time will be used to hear from those who do not RSVP.
3. Use the RSVP and topic information to make a preliminary list of presenters. Prepare a logical order of presentation – for example, put all the speakers focusing on access to medications or need for a drop-in center together. Post this list near the door, for people to see as they arrive at the forum.
4. Have a sign-up sheet at the door for additional individuals or groups that wish to speak – asking for name, affiliation, and topic. Use this information to prepare an additional list, and let people speak in the order in which they sign up. This way, if you don't have time to hear from everyone, you are making decisions about who speaks in a fair way.
5. Have the Board Chair run the meeting (or the Executive Director). At the beginning of the session, welcome people, describe the strategic planning process that this meeting feeds into, and indicate that staff are taking notes on the presentations (and staff and Strategic Planning Committee members will review written materials) for use in decision making for the strategic plan. Present the groundrules. Remind presenters that they have up to 5 minutes to speak (or 10 if organizational representatives) and that you will be using a timer – and that a yellow card will go up when they have 30 seconds left and a red card when their time is up. Tell people about the order of presentations. Thank people for their time.

6. Decide if you will permit questions from the Strategic Planning Committee during presentations. It is probably best not to permit them other than essential clarifying questions if you are worried about having everyone get a chance to speak – but fine if there is a small group of presenters. You can ask that other questions be held for the open discussion period. Announce this policy at the beginning of the meeting.
7. Announce the first 2-3 speakers, and ask them to come to the front. (Continue to do this throughout the meeting, to keep the presentations moving with minimal delays for people to come to the podium.)
8. Begin the presentations. Use a timekeeper with a timer or stopwatch, and have the timekeeper warn people when they have 30 seconds left (use a prepared yellow card), and put up a red card when time is up. Give not more than 30 seconds additional time beyond the 3 minutes – being sure to treat everyone equally. Thank each presenter and invite him/her to leave any desired written materials with a specified person.
9. Continue to the end of the RSVP list. Then begin on the list of people who signed up at the door. Use the same process.
10. When the time comes for the open discussion, announce this. Invite questions for the Committee and presenters. The same Chair may be used, or a facilitator may be helpful for this section of the meeting.
11. When time is up, thank everyone individually and then thank the group.
12. Make some kind of promise to share the findings of the environmental scan/needs assessment process. This might be another community meeting, sending out of the written report and strategic plan, etc.