

## **Checklist for the Improvement Plan Meeting**

### **1 month out from meeting**

Create attendee list that includes representatives from state (both Medicaid and CHIP programs) and stakeholder groups  
Send out a “Save the Date” to invitation list  
Plan a significant amount of time for this meeting/discussion – at least 2 hours, possibly 3 hours to discuss what was learned through this exercise as well as the goals of the group going forward.

### **2 weeks out**

Secure a meeting space that will accommodate all those invited  
Create and send invitation to the meeting that includes the following information (so attendees have time to review all pertinent materials prior to the discussions at the meeting):

- Meeting Agenda (even if in draft form)
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- Completed Process Maps
- Responses/Output report that resulted from the Interactive Online Diagnostic Assessment
- A summary of responses to the questionnaires that stakeholders completed
- Blank Improvement Plan worksheet (to be filled out as a group during the meeting)

Give the invitees a homework assignment (within the invitation) to read all materials and come prepared to discuss their goals for improving enrollment and retention of children’s coverage programs.  
Secure a conference call phone line to include those that cannot attend the meeting in-person

### **1 week out**

Prepare name badges and tent cards for all attendees  
Assemble “folder” with all meeting materials  
Identify the meeting facilitator and a note-taker

### **3 days out**

Send out reminder email to confirmed attendees that includes:

- Finalized Agenda
- Participant List
- Directions to the meeting and/or a call-in number

### **On site day of meeting**

Setup conference/meeting room to encourage dialogue  
Plan an icebreaker to kick off the meeting

### **Post-meeting follow-up**

Celebrate a successful meeting!  
Send thank you letters/emails to participants and include:

- The completed (even if in draft form) improvement plan worksheet that the group worked on throughout the meeting
- A note about any follow-up or next steps