EGM Consulting, LLC

Town Hall Meetings:
A Tool for Rapid Needs Assessment or PSRA[1]

What is a Town Hall Meeting?

A Town Hall meeting is a community meeting that is held to obtain community views and have open discussion about issues. They are sometimes called "community forums." As used in Ryan White programs, they are public meetings but typically target specific groups, often people living with HIV (PLWH) and/or HIV service providers. Usually the main focus is to obtain diverse input about service needs, barriers, and gaps; satisfaction with current services; and trends and concerns. Ideally, these are more than input sessions where the topics are determined solely by individuals who ask to present. They can provide opportunities for the Planning Council to request input on specific issues and for discussion among community members and with the sponsoring organization. Often the facilitators are Planning Council or committee leaders.

Town Halls usually have more participants than focus groups – it is not unusual to have 30-40 participants with broad community recruitment. This makes facilitation and time management important. Sometimes people who want to speak are asked to sign up, but it is important to allow time for dialogue among participants and with the facilitators, not just presentations.

Town Halls are normally held in a community facility but – in the age of COVID-19 – can also be held online, ideally using an easily accessed electronic platform so people can connect via smartphone, tablet, or computer. This document focuses on face-to-face meetings, but provides a few suggestions for adjustments for online use. If your Planning Council has learned to successfully run meetings remotely, including Consumer Committee meetings, many of the same sound practices and strategies apply, as well as the connectivity challenges that may limit or prevent participation by some consumers.[2]

How are Town Meetings Used?

PSRA: Ryan White Part A Planning Councils often use Town Halls just before they begin their Priority Setting and Resource Allocation (PSRA) process, to obtain current information to use as input to decisions. For example, the Planning Council may hold 3-4 Consumer Town Halls in different geographic parts of the Eligible Metropolitan Area (EMA) or Transitional Grant Area (TGA), providing updated information for PSRA. Participants can be asked to identify their top-priority service needs using a rating process, and this input can be aggregated and used to inform the Planning Council's priority-setting process. Planning Councils also use Town Halls to gain input from HIV service providers, either at a Town Hall meeting with consumers or through a separate meeting.

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[1] Originally prepared by Emily Gantz McKay for Mosaica; greatly expanded and updated in 2020 for EGM Consulting, LLC.
[2] See JSI Planning CHATT's "Remote Meetings: Tips for PC/PBs," on the Planning CHATT website.

Rapid Needs Assessment: Town Halls can be part of a rapid needs assessment effort at the end of a Planning Council's data-gathering process – to ensure that the Planning Council is aware of recent events and emerging community concerns. They can be planned and implemented fairly quickly and managed by Planning Council members and Planning Council Support (PCS) staff, and they typically provide refreshments but not incentives. Many Planning Councils are using or considering remote rapid needs assessment to better understand the impact of COVID-19 on people with HIV, especially Ryan White clients.[3]

Input for Applications: Ryan White Part A programs that have not done recent needs assessment can use Town Halls to obtain community input on current trends or issues to include in the application. Part B programs use Town Halls as part of their "public advisory planning process, including public hearings," as required for their application. [Ryan White Legislation, Section 2617(b)(7)(A)]

What are the Key Success Factors?

To ensure that your Town Hall provides useful information from diverse participants for planning and decision making, focus on the following:

1. **Effective recruitment**, to ensure good turnout and diverse participation. The focus should be on engaging people whose voices would not otherwise be heard, such as individuals who are not Planning Council members or regular participants in consumer committees or caucuses. This begins with choosing a location that is both accessible and comfortable for your target population, and then doing systematic outreach. Recruitment should target key populations and ask community-based HIV and other human service providers, faith-based institutions, and community leaders to inform consumers of the importance of participation in such events. If you want to hear from consumers who are not fluent in English or need sign language interpretation, make it clear that professional interpretation will be provided – or schedule a separate meeting conducted in another language. If stigma is an issue, let people know that they do not need to share their names or HIV status to attend. If you include providers or have a separate provider Town Hall, encourage participation by front-line staff who work with consumers and participation by service providers that are not Ryan White-funded. The goal is to bring together a diverse group of 25 or more people to provide their views on services and needs.
2. **A plan for gathering needed information.** A successful town hall meeting needs to be well planned, publicized, and facilitated. Rather than providing only an open forum, it uses a carefully planned set of topics or questions to obtain information the Planning Council needs for decision making. It also gives participants time to raise their own issues of concern. Often the meeting includes several different components, such as presentations from community members, facilitated discussion about topics important to the Planning Council, and community input on service priorities. Focusing on key issues and questions

[3] For more ideas on Rapid Needs Assessment, see EGMC's new "Quick Guide to Rapid Needs Assessment at a Time of Social Distancing: Ideas for Planning Councils," on the EGMC website, www.egmc-dc.com.

helps avoid the meeting become primarily a complaints session or spend a lot of time on issues of narrow interest. You want to hear about problems, but you also want to learn about potential solutions, and you need input on issues the Planning Council will address in its decision making.

3. **A well-defined agenda and process** for gathering information, managing discussion, keeping everyone engaged, and doing it all in 1½ to 2 hours (up to 3 hours if you use "topic tables," described below). Planning a Town Hall meeting is similar to developing the questions or "script" for a focus group, but implementing it can be more challenging. The group is larger and more diverse and the process is more complicated, so the role of facilitators is more demanding. Often, several PC members – often committee co-chairs – share facilitation. Doing a "dry run" with facilitators and staff can be very helpful. PCS play a key role in logistics and time management as well as taking notes and managing a recording.

Sample Town Meeting Protocol

Following is a sample planning and implementation protocol for a Town Hall meeting or series of meetings. The protocol can be refined to focus on providers or mixed consumer-provider Town Halls, but was developed primarily for a consumer-focused face-to-face meeting.

1. **Decide how you want to structure and focus your meeting(s**). For example:

    - **Number and targets of meetings:** Do you want to hold separate meetings to hear from consumers and providers or joint meetings? Do you need separate sessions in each of several geographic locations/jurisdictions or meetings targeting different key target populations? Should there be a session conducted in a language other than English?
    - **Activities:** You may want to include multiple components; for example:
        - Individual presentations by consumers and/or providers or other interested residents.
        - A group discussion of key issues (with main topics usually pre-determined).
        - Topic tables or "mini-focus groups" where participants spend a defined amount of time discussing a particular topic, then perhaps move on to another table.
        - Community priority setting, where participants vote for their top service priorities, usually their top 5 priorities, and the votes provide a community ranking of services.
    - **Content focus:** What kinds of information does your Planning Council most need to inform decision making? You will probably want to choose a small number of key issues or questions to address (e.g., key barriers to care, service gaps for particular populations, promising service strategies – topics on which the Planning Council needs more or more current information), plus flexibility to allow participants to raise and discuss other concerns or issues. If there are particular gaps in your needs assessment or other available data, use the meeting to get community input that helps fill those gaps. If there has been an important recent change in services (e.g., a provider closed or a new one began serving PLWH).

- **Food and transportation:** You will probably need to provide some refreshments or a boxed lunch for participants, depending on the timing of the Town Hall. If the location is in an area that is hard to reach, you may want to provide bus passes or other transportation assistance.

2. **Recruitment:** Once you have identified key target populations and meeting location(s), you can decide how best to recruit participants. Perhaps the PC and consumer committee members will play a key role, using their personal and organizational contacts. Perhaps several committees should work together on developing and implementing the recruitment plan. Collaborate with the recipient; agree on what you will ask from subrecipients, and develop an outreach list of PLWH groups and other organizations.

3. **Agree on meeting components and procedures and lay out your plans.** Then document these processes in writing for your use, and summarize them for participants. Include a brief description of each Town Hall component on your recruitment flyer, email, or social media post. Hand out the summary processes at the door or provide them as an online handout, accessible on your website, so everyone can see this information before the meeting. Consider each component of your meeting. For example:

   Presentations:

   - Ask presenters to provide their names (or a nickname), affiliations if any, and topics they want to address.
   - Identify a set of issues important to the Planning Council, agreeing on them early so they are included in invitations and all outreach/recruitment efforts.
   - Give each presenter 3-5 minutes to speak [If you expect to have lots of presenters, use a 3-minute limit]. Sometimes providers are given a longer time to present, perhaps 5-7 minutes.
   - Allow presenters to provide written material but not more than perhaps 3-5 pages.
   - If staff and clients from the same organization want to speak, impose a limit of 1 staff member and 3 clients per organization (or whatever you feel is fair).
   - Ask people to RSVP before the meeting date, so you can put them on a presenters list. Allow people who don't RSVP to speak in the order in which they sign up at the door, with the understanding that time limits may prevent everyone from speaking.
   - Encourage presenters to address your identified focus issues(s) or question(s), but also expect them to talk about other issues of concern to them.
   - Have someone prepared to enforce time limits, with lights or signs to let presenters know when to start (green sign), when they have 30 seconds left (yellow sign or are out of time (red sign).
   - Prepare a release form for participants to sign that gives permission for recording, if you want to tape the presentations or the whole Town Hall Meeting.

   Group Discussion:

   - Set aside a specified amount of time (typically 30-45 minutes) after the presentations for open discussion.

- If you are in a large facility, arrange for microphones – either on stands in the aisles or circulated by volunteers or staff – so people who have questions or comments can easily be heard.
- Focus this part of the meeting primarily on the focus issues(s) or question(s) identified in the announcement, but agree that facilitators can use their judgment in adding topics that arise during the presentations.
- Be sure your facilitators are prepared to raise questions or issues (referring to the presentations where appropriate), facilitate discussion with participants, and limit time per topic to ensure discussion of several topics.
- Be sure the discussion is taped and that someone (usually PCS) takes notes as well.

Topic Tables (Mini-Focus Groups) – OPTIONAL [Sometimes used instead of open discussion]

- Identify a number of key topics you would like to address with small groups of participants – for example, if the Town Hall Meeting focus is barriers to care and how to overcome them, the topic tables might focus on specific populations and their barriers to care – e.g., young African American MSM, women of childbearing age, limited-English-proficient PLWH, transgender PLWH, individuals who live in outlying counties rather than central cities where most services are located, newly diagnosed PLWH).
- Assign one topic to each table, and prepare a sign for each table indicating the topic for that table. For example: Barriers to care for limited-English-proficient PLWH.
- Be sure the number of tables is appropriate to the expected number of participants, so you have 5-8 participants per table.
- Be sure you have a big room – if you are also doing presentations, this might be the back of an auditorium or a separate room. Set up round tables with chairs for 5-8 people.
- Have a facilitator at each table with 3-5 prepared questions. Ask Planning Council members to play this role and be sure they have written instructions and perhaps quick training. Where possible, assign a person with appropriate experience or expertise.
- Set aside at least 45 minutes for this component if participants will participate in only one topic table discussion, and at least an hour and a half if they will participate in two.
- Begin by asking participants to come to the table of their choice. If one table has too many people, ask some of them to pick another table and come back to this one for the second discussion period.

- Recognize that some participants will move from table to table during the discussion, and be sure facilitators are prepared to manage that. It can be helpful to briefly summarize main points several times during the discussion period.
- Have the facilitator do introductions (first name and perhaps whether they are a Ryan White consumer or provider, where they live), and then facilitate discussion of the specified questions and topic. Emphasize that data will be used only in the aggregate, with no names used. Be sure someone is taking notes.
- At the end of the specified period – usually 30-45 minutes, depending on the topics you choose and the number of questions – ask participants to choose another table and repeat the process.
- If there is time on the agenda, consider asking someone at each topic table to share a quick 2-minute summary of key points with the full group.

Service Priorities:

- Explain to participants that the Planning Council prioritizes fundable service priorities each year, and you want their input on their top priorities.
- Provide all participants (and/or project on a screen) a list of Part A-fundable service categories, perhaps listed in order of the Planning Council's agreed-upon service priorities for last year and suggest focusing on perhaps the top 15. Probably many of them will have been mentioned during presentations or open discussion.
- Ask if any of those service categories are unfamiliar, and answer questions. Have available a handout briefly describing each service category, for answering questions. You can use Quick Reference Handout #3 in Module 2 of the PC/PB Training Guide, which is available online on the Planning CHATT webpage, at https://targethiv.org/sites/default/files/supporting-files/PlanningCHATT-Module2-QRH2.3.pdf.
- Ask participants for an initial vote to identify the top 8-10 categories. You can do this by asking people to vote not more than 5 times, stand to indicate support when the service category is read out, and identify the categories that get the most votes.
- Then ask participants to prioritize their top five categories. If the group is large, this probably needs to be done on paper. You can include a column for this on the list of service priorities you gave participants, to make aggregation a little easier, or just have participants put the numbers 1-5 on blank paper and list a service priority next to each number.
- You probably won't be able to count the votes during the session, but you can agree to send a summary of the meeting with the service priorities to anyone who RSVP'd or provided their name and contact information (email or mailing address) as they come into the meeting.

3. **Set the date and time and choose your location.** Identify bus lines and other public transportation access points, and include that in your outreach. Indicate whether parking is available, and what it costs.

4. **Recruit participants.** Be sure the invitation lists each component of the Town Hall meeting (e.g., brief status report from Planning Council leadership, presentations, general discussion or topic tables, service prioritization). Ask people to RSVP to help in planning, but be prepared for people to arrive without letting you know they are coming. One way to encourage RSVPs is to let people know that for presentations, those who RSVP ahead of time will speak first, so they are assured of a spot on the agenda; those who sign up at the door are not. Ask presenters for a name (or nickname), contact information, affiliation and role (i.e., staff, volunteer, Board, or consumer) and the topic they want to focus on.

5. **Use the RSVP and topic information to make a preliminary list of presenters.** You can either assign time slots in order of the RSVP or prepare a logical order of presentation – for example, put all the speakers focusing on barriers facing a particular subpopulation together. Post this list near the door, for participants to see as they arrive at the meeting.

6. **Ask participants to register as they arrive,** providing contact information if they want to receive a summary of the meeting. You may want to allow people to attend without giving their full name or contact information.

7. **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. Discuss ahead of time how you will handle these late presenters. You might 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. Alternatively, if you have only a few last-minute sign-ups, you can fit them into the schedule based on the topics they want to address.

8. **Be sure the Planning Council is well represented at the meeting.** Often the Chair or a Co-Chair welcomes participants, and Consumer and/or Needs Assessment Committee Chairs share facilitation responsibilities. At the beginning of the session, welcome people, describe the needs assessment or PSRA process that this meeting feeds into, and indicate that PCS staff or volunteers are taking notes (and staff and committee members will review written materials). Present groundrules and review the agenda. Remind presenters of the amount of time they have, and explain that you will be using a timer – and how you will let them know when their time is ending. Tell people about the order of presentations. Thank people for their time.

9. **Receive presentations.** Explain the process and indicate your plans for handling questions from non-presenters – whether they can be asked after the presentation or must wait for general discussion. Announce the first 3-5 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.) Or ask all presenters on the same topic to sit at a table in front, make their presentations. If you are not planning a separate open discussion, you may want to allow presenters to then answer questions and/or engage in

discussion with other participants. Enforce presentation time limits as planned – be firm but polite. Give not more than 30 seconds additional time beyond the time limit, being sure to treat everyone equally. Thank each presenter and invite them to leave any desired written materials with a specified person**.** Continue to the end of the RSVP and at-the-door sign-up lists, then allow additional participants to speak or ask questions if there is time.

10. **If you are planning open discussion, announce this at the beginning of the meeting, and give a break if desired between presentations and discussion.** Then invite questions for the Committee and presenters. The same Chair may be used, or you may want a different facilitator for this section of the meeting. The facilitator should be prepared to raise questions if the audience is initially quiet. Be sure to direct questions to presenters and encourage them to respond and to ask their own questions of other participants and the committee.
11. **If you are planning topic tables, explain how they work and summarize guidelines and the number of "segments" and amount of time people will spend at each table.** Allow 5 minutes for people to choose a table, announce starting and ending times, and monitor the process. If you have more than two segments, consider providing a 10-minute break after the second segment.
12. **Leave at least 20 minutes for service category priority-setting if that is part of the schedule.**
13. **When the meeting time is up, thank the group and promise to share findings from the meeting**. This might be through another community meeting, an online session, an e-mailed or mailed summary report, posting of the summary on the Planning Council website, etc.
14. **Hold a quick debrief with facilitators, the responsible committee, and PCS, and be sure follow-up assignments and time deadlines for aggregating priorities and summarizing presentations and discussion are clear.** If you are planning additional Town Halls, be sure to refine processes based on this experience.
15. **Have the appropriate committee review findings and determine how best to share them with the full Planning Council.** You may want to report first to the Consumer Committee and Executive Committee, then at a Planning Council meeting, and/or make this information a part of your PSRA data presentation. Be sure you share findings with participants and the community as promised.