BILT KSA Meeting Preparation Checklist

| **When** | **Task** | **Assigned To** | **Done √** |
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| **When You Decide to Do a BILT KSA Meeting** | **Identify existing or potential employers for the BILT and gather contact information.**   * Consider a balanced distribution of size and type of business. |  |  |
| **Determine what you want to get from the BILT and develop your sales pitch.**   * Establish expected time commitment per quarter. * Establish expectations of involvement and activities.   + Focus on job skills validation, course and curriculum validation and modification, job forecasting, internships, and other employer engagement activities at your college. |  |  |
| **Reach out to the presidents of the targeted companies to share your vision of what the program can mean to the area.**   * Explain the importance of having a subject matter expert, usually a first-line manager, involved in the BILT. |  |  |
| **Consider meeting with 1–2 key employers (either individually or together for lunch) to discuss the BILT process and format.**   * Seek their buy-in and their willingness to recruit other employers for the BILT. |  |  |
| **Review invitation templates for possible use in drafting the invitation.** |  |  |
| **Ensure departmental faculty are engaged, understand the process, and are involved**.   * Note: Faculty still control the curriculum and use the prioritized KSAs and BILT discussion to guide curriculum updates. |  |  |
| **Determine date for the meeting and reserve the room.**   * Face-to-face is best for the KSA analysis. * An 8:30 a.m. start time on a Tuesday, Wednesday, or Thursday works best. * Schedule so business representatives come to the meeting directly rather than trying to extricate themselves from work. |  |  |
| **Ensure catering is available on that day**.   * Good food is essential – no “rubber” chicken and no soggy sandwiches. |  |  |
| **Create the pro forma list of KSAs and have it reviewed by key campus personnel and at least 1–2 employers for suggested changes prior to the meeting.**   * This initial list is the best guess of possible KSAs the employers will want. * Providing this list shortens the time needed for evaluation. * See the document “Creating the Pro Forma List of KSAs” |  |  |
| **3 Weeks Prior to Meeting** | **Send the invitation letter to the BILT, requesting RSVPs.**   * Printed letters are preferred, at least initially, because employers can easily ignore email. Messages from unfamiliar senders can end up in SPAM folders. |  |  |
| **Email invitations to appropriate college staff and faculty.**   * Include all faculty in the department or just the faculty in the subdiscipline, depending on the size and scope of your departmental team. * Consider inviting the appropriate dean, vice president, and even the president to give them an opportunity to learn more about your work. |  |  |
| **Invite faculty from support disciplines like math, English, and speech as appropriate.** |  |  |
| **Secure A/V equipment including a projector.** |  |  |
| **Provide web meeting access to the face-to-face meeting.**   * Those who cannot attend in person may phone in and/or view the meeting via web. * It helps to have screen sharing capabilities to display information for discussion. Meeting software such as GoTo Meeting, WebEx, and Zoom have this capability. |  |  |
| **Secure catering. Arrange for water, coffee, and meals/snacks.** |  |  |
| **Reconfirm the room reservation and arrange for room set-up.**   * Typically, a “U” within a “U” plus a refreshment table and a registration table works well. The inner “U” is for the business representatives, and the outer “U” is for the faculty. |  |  |
| **Assign someone to be the recorder and tally votes.** |  |  |
| **Assign someone to take minutes.**   * This individual can also staff the registration table but cannot be the recorder. |  |  |
| **Arrange for the meeting to be recorded.**   * This can be very helpful for producing and clarifying minutes. |  |  |
| **2 Weeks Prior to Meeting** | **Tabulate the RSVPs.** |  |  |
| **Call those who have not yet RSVP’d to promote the event and get responses.**   * Make an effort to secure at least 15–20 positive RSVPs. * It is typical for as many as half of those responding positively to have something come up that prevents them from attending. |  |  |
| **Ensure the KSA list has been finalized and reviewed.** |  |  |
| **Import KSAs into a spreadsheet that will tally the votes during the meeting.** |  |  |
| **Test the A/V and web-meeting equipment and software, as applicable.** |  |  |
| **Prepare for the Faculty Cross-Reference Meeting that will follow the KSA meeting**:   * Determine the date, time, and room for meeting. * Invite faculty via calendar appointment. * Working with faculty, identify courses that are or may be included in the targeted certificate/degree. * Input course names or numbers into the KSA spreadsheet on the right side. (Hide these columns during the KSA meeting.) |  |  |
| **Finish any remaining tasks from the Week 3 list.** |  |  |
| **1 Week Prior to Meeting** | **Send reminder email /calendar invitations to all who were invited to the KSA meeting.**   * Ask those who have not RSVP’d to do so (includes faculty). * Include a campus map and parking instructions along with directions to the room and a PDF of the original invite. |  |  |
| **Verify catering is arranged.**   * Confirm headcount. * Ensure delivery aligns with your meeting schedule. |  |  |
| **Print KSA voting spreadsheets for everyone attending the meeting**.   * DO NOT email the spreadsheet in advance or to those not attending because the discussion during the KSA process is just as important as the voting. * Those who receive the spreadsheet in advance often fill in and return them, skipping the discussion. |  |  |
| **Prepare and print sign-in sheet for BILT and faculty.** |  |  |
| **Ensure recorder and minute taker are confirmed to attend.** |  |  |
| **Finish any tasks left from previous weeks.** |  |  |
| **2 Days Prior to Meeting** | **Send another email reminder with map.** |  |  |
| **Reconfirm A/V and catering.** |  |  |
| **Prepare table tents for all attending.**   * Including faculty and college staff. * Prepare some blanks as well for those who show up without having RSVP’d. |  |  |
| **Load the KSA spreadsheet on the recorder’s laptop.**   * Connect this laptop to the projector and use it for screen-sharing for the web meeting so BILT members can see the calculated averages. |  |  |
| **Load the KSA meeting introductory presentation and voting spreadsheet onto facilitator’s laptop.** |  |  |
| **Meeting Day** | **Send final email reminder.**   * If the meeting is at night, send early on the day of the meeting. * If the meeting is in the morning, send the afternoon before. |  |  |
| **Arrive early to ensure everything is set up properly.** |  |  |
| **Set up registration table.**   * Sign-in sheet * Name tents * Information about the college/program * Do not share existing course patterns for certifications and degrees so as to not influence the discussion. |  |  |
| **Test the equipment set-up including A/V and online access (if included).** |  |  |
| **Make sure all presentations and spreadsheets are on the appropriate devices.** |  |  |
| **Greet the employers.** |  |  |
| **Following the Meeting** | **Send hand-written thank you notes to all the employer representatives who attended and participated in the meeting.**   * Include information on when the faculty crosswalk meeting will take place and when the employers can expect to receive feedback from their input. * Encourage them to provide feedback on the process. |  |  |
| **Send thank you notes to the presidents or managers of those who attended.** |  |  |