

Checklist for Organising Pilots

This checklist is intended for pilot managers to plan and implement successful pilots together with the pilot teams and pilot hosts. This list is focused on the practical level of arranging the mandatory meetings. The four meeting memo templates, found from [the CommuniCity Documents of the Piloting Toolkit](#), guide the pilot manager through each phase of the piloting process.

- ☐ **Familiarise yourself with the [CommuniCity Piloting Manual](#)**
- ☐ **Familiarise yourself with the Piloting contract**

Pilot host meeting

- ☐ Schedule a pilot host meeting with each pilot host after the evaluation is completed
- ☐ Prepare the pilot host meeting materials (one slide deck per pilot host)
- ☐ Ask the pilot host if they have special requirements for the piloting process e.g. research permit or ethical approval and add this framework to the slides
- ☐ After the meeting edit the slides into memo and share it to the participants
- ☐ Record the approved memo to a secure place with access to correct people

Kickoff meeting

- ☐ Schedule the kickoff meeting to follow the pilot host meeting
- ☐ Prepare the kickoff meeting materials (one slide deck per pilot)
- ☐ Share the slides preferably at least three working days before the meeting for collaborative preparation
 - ☐ Ask the pilot host to prepare slides of their expectations of the pilot and their framework for the collaboration
 - ☐ Ask the lead applicant to prepare their pilot plan with schedule
- ☐ After the kickoff meeting:
 - ☐ Future meeting arrangements
 - ☐ Edit the slides into memo and share it to the participants for approval
 - ☐ Record the approved memo
 - ☐ First payment to the pilot team as agreed in the piloting contract

Midterm reporting and meeting

- ☐ Schedule the midterm meeting on time (if not done already in the kickoff meeting)
- ☐ Share the midterm report form to the lead applicant minimum 2 weeks before the meeting
- ☐ Prepare the midterm meeting materials
- ☐ Remind the lead applicant of the midterm report two weeks before the midterm meeting + remind of the meeting and ask them to prepare a presentation to the shared document
- ☐ Share the submitted midterm report to the meeting participants one week before the meeting. Remind them of the shared slide document to be collaboratively prepared.
- ☐ After the midterm meeting:
 - ☐ Future meeting arrangements
 - ☐ Edit the slides into memo and share it to the participants for approval
 - ☐ Record the approved memo

Final reporting and meeting

- ☐ Schedule the final meeting on time (if not done already in the midterm meeting)
- ☐ Share the final report link to the lead applicant min 2 weeks before the meeting
- ☐ Prepare the final meeting materials
- ☐ Remind the lead applicant of the final report two weeks before the final meeting + remind of the meeting and ask them to prepare a presentation to the shared document
- ☐ Share the submitted midterm report to the meeting participants one week before the meeting. Remind them of the shared slide document to be collaboratively prepared.
- ☐ After the final meeting:
 - ☐ Follow up meeting arrangements
 - ☐ Edit the slides into memo and share it to the participants for approval
 - ☐ Record the approved memo
- ☐ Final payment to the pilot team
- ☐ Feedback from the pilot host after the piloting has ended (e.g. a meeting or a survey)