

IN-PERSON EVENTS

LOGISTICS CHECKLIST

Below are items to consider as you put together the plan and logistics for your event.

EVENT TITLE:

LOCATION(S)	DATE(S)
Venue 1	Date(s):
Venue 2	Date(s):
Venue 3	Date(s):
Venue 4	Date(s):

Venue 1

Venue Name:

Address:

Contact Name:

Phone:

Email:

Estimated Number of attendees

Venue 2

Venue Name:

Address:

Contact Name:

Phone:

Email:

Estimated Number of attendees

Venue 3

Venue Name:

Address:

Contact Name:

Phone:

Email:

Estimated Number of attendees

Venue 4

Venue Name:

Address:

Contact Name:

Phone:

Email:

Estimated Number of attendees

SEVEN TO EIGHT MONTHS BEFORE EVENT

	ITEM TO REVIEW/ CONFIRM	COMMENTS	TIPS
<input type="checkbox"/>	HOLD TEAM MEETING		Determine event audience, goals and objectives, date and time, location, and budget. Also determine who can enter into contracts for the event.
<input type="checkbox"/>	PREPARE EVENT SPECIFICATIONS		Create a document outlining event information, such as # of attendees, # of rooms needed (general session, breakout/concurrent sessions, and meals), desired room setup, AV and Wi-Fi, catering needs, registration location, security, ADA accessibility, etc.
<input type="checkbox"/>	RESEARCH VENUE OPTIONS		We recommend sourcing three venues that can comfortably fit the size of your group in general session and breakout rooms. Creating a chart with a list of space and times needed is helpful when sourcing.
<input type="checkbox"/>	CONSIDER ADDITIONAL FEES		Examples: table & chair rental, AV, catering, shipping and on-site materials handling, speaker fees, parking, security, etc.
<input type="checkbox"/>	DISCUSS SIGNAGE OPPORTUNITIES		Discuss where signs can be placed in the venue and promoted on leader board (if applicable).
<input type="checkbox"/>	ACCESS DATE AND TIMES		If non-hotel venue, check the early access policy in case the agenda calls for early access.
<input type="checkbox"/>	SELECT VENUE AND NEGOTIATE CONTRACTS		Review agreement carefully before signing and be sure to check and understand the cancellation policy and fees.
<input type="checkbox"/>	PROVIDE VENUE FEE DEPOSIT		Rule of thumb is 50% of total cost of event; usually paid when agreement is signed.

SEVEN TO EIGHT MONTHS BEFORE EVENT

<input type="checkbox"/>	SHARE PRELIMINARY EVENT SCHEDULE		Share your preliminary event agenda with venue (update as agenda evolves and is finalized). Include layout of room(s) and how many people you expect, especially if it differs from your initial proposal.
<input type="checkbox"/>	CREATE SPONSORSHIP OPPORTUNITIES		Discuss potential sponsorship ideas and fees with your team (funding, in-kind items, etc.).
<input type="checkbox"/>	CREATE EVENT TIMELINE AND MARKETING PLAN		Name event, outline tasks, responsibilities, and due dates. Include event content, logistics, website, admin/coordination, speaker, and VIP coordination, print materials, etc.
<input type="checkbox"/>	CREATE EVENT WEBSITE AND SHARE WITH TEAM		Determine platform to use (Cvent, Google forms, etc.), event name and URL, the best way to market the event, placement of sponsor logos, fees (if applicable), attendee information to capture during registration, what information to share (agenda, location logistics), what needs to be translated, etc.
<input type="checkbox"/>	CREATE SOCIAL MEDIA TAGS		Create appropriate social media tags for event (conference hashtag, Twitter handle, etc.) to share with attendees.

FOUR TO SIX MONTHS BEFORE EVENT

	ITEM TO REVIEW/ CONFIRM	COMMENTS	TIPS
<input type="checkbox"/>	REFINE PRELIMINARY EVENT SCHEDULE		Update with any new information/changes and share with venue.
<input type="checkbox"/>	RECRUIT PLANNING COMMITTEE		Identify any subcommittees needed based on your preliminary agenda.
<input type="checkbox"/>	IDENTIFY AND RECRUIT SPEAKERS		Identify and reach out to potential speakers for your event.
<input type="checkbox"/>	FINALIZE SPONSORSHIPS		Finalize contracts with sponsors and work to collect funding/in-kind items.
<input type="checkbox"/>	CREATE ATTENDEE COMMUNICATION LIST		Create attendee communication list. Examples include invitation to register, registration confirmation, "See you at the Event" email, meeting survey, etc. Identify what needs to be translated.
<input type="checkbox"/>	FINALIZE AND LAUNCH EVENT WEBSITE AND REGISTRATION LINK		Launch tested and approved event website and prepare for event/registration inquiries.
<input type="checkbox"/>	SEND ATTENDEE COMMUNICATION		Send event invitations. Address any questions and create FAQs as needed.

THREE TO FOUR MONTHS BEFORE EVENT

	ITEM TO REVIEW/ CONFIRM	COMMENTS	TIPS
<input type="checkbox"/>	PRELIMINARY CATERING MENUS		Create preliminary catering menus based on meeting agenda (breakfast, lunch, dinner, snacks, etc.) from venue/vendor catering options. Refine and finalize based on attendee dietary needs.
<input type="checkbox"/>	CREATE AND SEND EQUIPMENT PROPOSAL TO VENUE AND/OR VENDORS		Create a list of equipment needs (AV, sound, Wi-Fi, stage lighting and decoration, tech support) and send to venue or appropriate vendor.
<input type="checkbox"/>	SECURE INSURANCE POLICIES		Secure copies of proof of insurance if required by venue for host organization, outside vendors, and any entertainment hired.
<input type="checkbox"/>	REFINE PRELIMINARY EVENT SCHEDULE		Update with any new information/changes and share with venue.
<input type="checkbox"/>	CREATE ATTENDEE COMMUNICATION LIST		Create attendee communication list. Examples include invitation to register, registration confirmation, "See you at the Event" email, meeting survey, etc. Identify what needs to be translated.
<input type="checkbox"/>	CREATE PRELIMINARY LIST OF EVENT MATERIALS		Compile a list of items that will need to be translated and printed for event. Possible examples include agenda, speaker/presenter handouts, name badges, signage, giveaways, etc.
<input type="checkbox"/>	FINALIZE SPEAKERS AND PRESENTATIONS		Finalize event speakers and work with them on their presentation and any equipment needs.

TWO TO ONE MONTH(S) BEFORE EVENT

	ITEM TO REVIEW/ CONFIRM	COMMENTS	TIPS
<input type="checkbox"/>	SEND ATTENDEE COMMUNICATION		Registration reminder and continued marketing.
<input type="checkbox"/>	CREATE RUN OF SHOW		Use final agenda to create a run of show highlighting sessions, staff and speaker responsibilities, plus equipment and materials needed for each session.
<input type="checkbox"/>	FINALIZE EQUIPMENT WITH VENUE AND/OR VENDORS		Order equipment needed for event; review and sign off on agreements.
<input type="checkbox"/>	FINALIZE EVENT MATERIALS		Design documents and signs, proofread/edit, translate, and send to printer.
<input type="checkbox"/>	REFINE CATERING MENUS		Refine preliminary menus based on dietary requests and send to venue/vendor.
<input type="checkbox"/>	CREATE LIST AND ORDER EVENT SUPPLIES AND GIVEAWAYS		Finalize event supply list (pens, Post-it notes, etc.), as well as any giveaways and order.
<input type="checkbox"/>	DETERMINE IF ADDITIONAL STAFF IS NEEDED		Secure more staff if needed and confirm their roles.
<input type="checkbox"/>	SHIPPING INFORMATION		Confirm shipping address for materials.

ONE TO TWO WEEK(S) BEFORE EVENT

	ITEM TO REVIEW/ CONFIRM	COMMENTS	TIPS
<input type="checkbox"/>	FINALIZE CATERING HEAD COUNT		Confirm catering head count with venue/vendor.
<input type="checkbox"/>	FINALIZE EVENT ROOM SETUP		Confirm setup of general session room and breakout/concurrent meeting space room(s) with venue.
<input type="checkbox"/>	FINALIZE EVENT EQUIPMENT		Confirm equipment orders, delivery, and setup with venue/vendor.
<input type="checkbox"/>	COMPILE ATTENDEE EVENT PACKETS		Compile any handouts, background information, program booklets, etc. for shipping/transport to the event location.
<input type="checkbox"/>	FINALIZE SHIPPING		Box and ship meeting/event materials to venue.
<input type="checkbox"/>	FINALIZE RUN OF SHOW		Finalize run of show document and share with team.
<input type="checkbox"/>	SEND ATTENDEE COMMUNICATION		Send "See You at the Event" email to all attendees. Confirm date, time, location, dress code, and logistical information (parking, ground transportation options from venue, etc.).

DAY BEFORE AND DAY OF EVENT

	ITEM TO REVIEW/ CONFIRM	COMMENTS	TIPS
<input type="checkbox"/>	CONFIRM EVENT MATERIALS		Make sure all shipped materials arrived and registration area is ready.
<input type="checkbox"/>	COMPLETE WALK THROUGH RUN OF SHOW		Meet with staff and speakers to walk through the run of show to ensure all know their roles and responsibilities.
<input type="checkbox"/>	REVIEW EVENT SPECS		Set up registration area, make sure general session and breakout/concurrent session rooms are set and ready; review catering times and menus.
<input type="checkbox"/>	MANAGE THE EVENT		Troubleshoot any issues with venue/vendor and staff. Take notes if you can on things that went well and things that could have been improved so you don't forget. Ensure all attendees are taken care of with questions, concerns, etc.
<input type="checkbox"/>	DEPLOY EVENT SURVEY		Deploy event survey to all attendees at end of event or the day after.
<input type="checkbox"/>	DEBRIEF WITH STAFF		Schedule a debrief meeting with staff and others involved to evaluate the event. Celebrate successes, record feedback and changes for next time, and thank staff.
<input type="checkbox"/>	CREATE AND SEND THANK-YOU NOTES		Send a personal thank-you note to speakers and sponsors. Express your thanks to the venue/vendor and all involved.

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