

**Name of Activity:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date of Activity:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Planning and Logistics Checklist** | | **Actions for your activity** | **Notes/Updates** |
| **#1 Team** | * Who can help? If you have a team helping, can you assign individuals with different skills to specific roles? Plan a kick off meeting to start the project, introduce people, actions and deadlines. * Book volunteers for setup, during the activity and pack-down. Book in a briefing meeting prior to the event with time to iron out any issues they may notice and a debriefing meeting afterwards. * Consider how volunteers are going to get to/from the event * Look after the team’s wellbeing throughout the event - organise a rota that includes breaks. * How are you going to communicate with the team on the day? Ensure they know who to contact and how, if there is an emergency. |  |  |
| **#2 Budget** | * Plan your budget and regularly update the costs as you organize your event * Include a contingency budget for any unforeseen costs or last minute additions to the event * Are you paying your speakers? Think about travel reimbursements: forms and cost codes. |  |  |
| **#3 Date/Time** | * Does your event clash with a national holiday or another big event locally / within your organisation. This may both have pros and cons – e.g.for promotion/attendance/availability of resources and rooms * Is your event held during lunch time / after school – will your target audience be available? |  |  |
| **#4 Venue & Catering** | * What venue are you going to use? Consider capacity – how many people will be coming? Will you need a breakout room for lunches/workshops? Is the venue fully accessible? * Is it easy for people to travel to/from? * Do you need catering? How close up until the event can you change numbers for catering? |  |  |
| **#5 Marketing / Tickets** | * Do you need a website or social media? * Where will your public/audience be likely to see your advertisements? Magazines, social media, websites, posters, screens, local media? Will they see it, will it interest them? * Is your marketing strategy within your organisation's brand guidelines? * Can colleagues, teams, departments in the University help advertise to their networks? Consider contacting relevant local clubs and societies e.g. U3A. * Proof read all material carefully. * How are you going to sell tickets e.g. Eventbrite? |  |  |
| **#6 Equipment, Materials & Resources** | Do you need…?   * AV equipment - microphones, speakers, laptop, projector, screen * University marketing material e.g. tablecloths, banners * materials/resources for your activity e.g. worksheets * to produce a programme * reserved signs for seats, printed arrows to help people navigate the building * Guests lists printed last minute and a registration table set up? Do attendees need name labels? * Consider putting an event box together with stationary e.g. paper, pens, sellotape etc to help you deal with setting up the event and any unexpected issues. * How are you going to get equipment to the event? |  |  |
| **#7 People** | * Do you need to book any speakers for the day? Do this in advance to allow for availability – you may also need the names confirmed to go on promotional material. Ensure speakers are a diverse representation of your subject or community. * When / how are you going to brief your speakers? Do you need any information from your speakers in advance (e.g. dietary, car parking, booking transport/paying expenses, directions)? What about their presentation before the day to pre-load onto a laptop – will it work with your system (e.g. apple/windows etc.)? * Will you require speaker bios for introductions etc.? |  |  |
| **#8 Attendees** | * What info do attendees need in advance? e.g. directions, car parking, time of arrival. Do you need to send reminders/tickets to your attendees? * Do attendees need to bring anything? * What info. do you need from attendees- dietary requirements, medical issues, access requirements, car registration details (parking)? * Do attendees know how to get in touch? E.g. does the activity need an email address/phone no.? * Registration - will attendees need to register? If you only have enough space for people who have pre-registered, how will you avoid other people ‘dropping in’? Can tickets be bought on the door? |  |  |
| **#9 Health & safety, Legal Requirements** | * Do a risk assessment - keep it updated as you plan * Do you need insurance for the day - does your organization already have this? * If you have young people coming to the event, is there a place they can be advised to go if they are lost? Are you aware of safeguarding policies? * Do people need to be advised of fire safety regulations or where to obtain medical assistance? * Do you need to obtain ethical approval for the activity? Photographic permits? Parental permission? |  |  |
| **#10 Internal Liaison** | * ICT – inform them if may you need technical support * Security/Estates – inform them for safety and to ensure buildings remain unlocked, cleaners do not interrupt, lights stay on etc. * Porters - help moving equipment * Events & Comms teams – even if you are largely managing the event, it is a good idea to ensure they are aware and discuss the event with them so events do not conflict. The Comms team may be able to help market the event. * Can PEARL help? |  |  |
| **#11 Recording / Evaluating the Event** | * Ensure your evaluation plan is appropriate for your events, your aims and objectives so that you can report the success of your event and demonstrate the reasons to it again in the future. * Consider filming/photography to produce an online resource/promotional film after the event – consider ethics approval and permissions. * Download social media / website stats as evidence of online impact. Record connections that have been made/events that have come out of it? |  |  |
| **#12 Planning for last minute issues** | * What contingencies can you plan in to deal with last minute issues? Have you forwarded your desk phone to your mobile? * Will the weather impact your event? Consider tents/gazebos to provide shelter from the rain or sun - maybe offer a free hot drink if people are queueing outside, and remind them to bring an umbrella/sun cream/water. * If your venue lets you down at the last minute do you have a back-up plan? Ensure you send out directions from the previous venue to the new venue - have someone stationed at the old venue. * Ensure your audience is kept updated by all appropriate mediums – emails, social media advising visitors that the event is still going ahead etc. |  |  |
| **#13 Timeline** | * Plan an event timeline carefully. * Consider and plan for everything that needs to be done for the event in:   + planning for the event   + the close lead-up to (i.e. week before) the event   + during the event   + after the event – e.g. writing up/reporting on the event, thank yous, recovery! |  |  |