Section 8: Sample Checklists
Event Checklists

LOCATION CHECKLIST

☐ “Neutral” so that everyone will feel comfortable attending
☐ Easy to find and centrally located
☐ Accessible to people with disabilities
☐ Available for pre-event site visits
☐ Easily reachable contact person (both before and during the event)
☐ Appropriate electrical system for audio/visual equipment
☐ Served by public transportation
☐ Enough parking
☐ Required rooms (meeting room, break-out rooms, lunch/reception facilities)
Event Checklists

REGISTRATION CHECKLIST

☐ Master list of participants (to identify actual attendees)

☐ System for randomizing last-minute participants (*BTP staff to assist universities in determining appropriate methods*)

☐ Name tags, pens

☐ Name placards for participants, panelists and moderators

☐ Signs for outside the building to direct participants to the correct entrance

☐ Signs directing people to the correct registration area (A-L, M-Z, etc.)

☐ Signs for inside the building to direct participants to the correct rooms and restrooms

☐ Extra copies of the background materials and reading

MATERIALS CHECKLIST

☐ Registration and final surveys

☐ Copy of schedule to distribute to participants, moderators, observers and any other staff

☐ Additional background materials for reference in small groups and for distribution to observers

☐ Information/pamphlets about hosting organizations

☐ Information about the panelists, including brief bios

☐ Easels and easel-sized paper (to take notes in the small groups)

☐ Information about follow-up activities

☐ Dark colored markers to summarize key points

☐ Pens/notepads for the participants

☐ Table tents with participants’ names for small group discussions

☐ Carbon-copy forms to record the questions the small groups wish to ask of the panelists
Event Checklists

SITE CHECKLIST

☐ Location staff to be on-site before your event to unlock all necessary doors and make sure that the building temperature is comfortable

☐ Signage for parking, entrance, small group rooms and restrooms

☐ Audio/visual staffer at the event to troubleshoot

☐ Chairs and room set-up (make sure the break-out rooms are comfortable and conducive to conversation)

☐ Staging for panelists, including microphones, water and table tents with their names

☐ Cell phone/pager numbers for management team and all other service personnel (caterers, audio-visual specialists, custodians, etc.)

☐ Clear area for breakfast/lunch/reception (be sure to order one or two popular choices that will appeal to the broadest possible audience)

PANELIST/SPEAKER CHECKLIST

☐ Arrange for a speaker to welcome the group to the event

☐ Distribute a copy of the event schedule to all speakers and panelists

☐ Arrange for transportation (if needed) for speakers and panelists

☐ Call all speakers and panelists prior to the event to make sure they know when/where to arrive

☐ Assign a small group assistant to greet and meet VIPs and take them to the appropriate place

☐ Provide water for all speakers

☐ Distribute panelist bios to the person introducing them

☐ Be sure the person making opening comments is prepared to recognize any dignitaries in the audience
Event Checklists

OBSERVER/PRESS PACKETS CHECKLIST

☐ Observer protocols (to be distributed by the national staff in October)
☐ Event schedule
☐ Bios for panelists and speakers
☐ Press release detailing the event

STAFFING CHECKLIST

☐ Create and bring event signage (inside and outside)
☐ Bring a master list of participants, name tags and pens
☐ Welcome and direct participants on arrival
☐ Reserve seats (for VIPs, those with special needs, etc.)
☐ Meet and escort the press, panelists and VIPs
☐ Take notes/observe small group sessions
☐ Distribute and collect pre- and post-surveys
☐ Deal with special audio-visual needs
☐ Clean up after the event
☐ Troubleshoot the needs of the participants
☐ Support the moderators
☐ Staff member/s to distribute payment to the participants