

Event Planning Checklist:

- Decide on venue of event
- Contract with venue site for all included services (i.e. lodging, meals, transportation, printing/copying)
- Review contract with procurement staff (costs within per diem, no alcohol on bill, etc.)
- Reserve an ESTIMATED BLOCK of hotel rooms for all participants, revising as exact names and numbers are known.
- Decide on list of participants together with regional offices and program director/managers
- Draft letter of invitation, getting approval from executive management.
- Send all signed invitations to the regional offices to send to regional participants
- Arrange number and topics of sessions together with appropriate program personnel
- Invite speakers, facilitators and moderators for sessions
- Invite VIPs (Ministers of Health, USAID, etc.)
- Send all participants a registration form (including event information packet)
- Send memo to all partners regarding their individual display tables
- Send display needs form to all partnership reps for A/V, instructions on their amount of space, requests for designs or certain items/themes
- Collect materials related to event (especially from speakers) for conference books and any distributed materials
- Translate all materials into appropriate language(s)
- Procure bids with procurement officer for copying, printing and binding
- Create binder/booklet covers for printing company
- Order signs for sessions, podium (as well as conference banner if necessary)
- Arrange airline travel and visas for all participants to event (working with Regional Offices)
- Arrange airport pick-ups and drop-offs for all participants (cars for VIPs, vans or buses for large groups)
- Interview and contract with interpreters (simultaneous, consecutive, and escort)
- Plan number of necessary interpreters for sessions, tours, meetings and airport greetings
- Arrange all A/V needs for the event, including interpreter booths, all projectors, computers, laptops, etc.
- Arrange entertainment for special events (opening reception, closing banquet)
- Arrange site visits to appropriate sites (hospitals, universities)
- Arrange transportation for all site visits
- Choose meals and coffee break food items in accordance with daily per diem amount
- Inform all staff of daily per diems, if applicable
- Maintain database of all arrivals/departures/hotel/special needs
- Prepare address book for participants (if necessary)
- Choose name badge design for event
- Print name badges for all participants from database

- Appoint person to update database (make changes and corrections) during event
- Order ribbons for participants, as well as VIPs, Board, interpreters and staff
- Order flags: large flags for sessions, small flags for tables at banquets
- Arrange for pre-event registration to include name badge and material distribution, as well as information center-point
- Staff adequate amount of staff to work in registration room during event
- Arrange for photographer for all sessions and special events
- Arrange all press coverage, releases and conferences
- Appoint one nurse/doctor to be on-call for any emergencies
- Arrange for gifts to hotel staff, special guests when appropriate
- Draft and send thank you letters to all speakers (and event participants where necessary)
- Distribute photos of participants along with thank you letters

- **OUTSIDE THE US**

Whenever a conference or other event is planned to take place in the regions, program associates/analysts should *co-ordinate with the regional office staff* for that region. Even if it is a partnership-sponsored event, the local staff can check prices for accuracy, be of assistance in creating an accurate budget taking into account specifics of the locality, and bid necessary services to ensure that we are being cost-effective. The AFO can also work with the overseas partner to organize logistics including travel, interpretation/translation, transportation, preparation of materials, meals and accommodation. Regional offices have long experience in planning such events; whether or not they are directly involved in the final production, their supervision and advice are a valuable resource.

****FOR MORE DETAILED INSTRUCTIONS ON EVENT VENUE AND SPECIFICATIONS, PLEASE SEE BELOW.**

How to secure a location for a meeting/workshop or conference:

- 1.) Determine the per diem for the city where the activity is to be held.
- 2.) Obtain a cost center and/or accounting codes from the finance department.
- 3.) Submit specifications sheet to the travel agent, who will meet with you after 3 business days to discuss options available.
- 4.) Choose a location from the viable options. Please keep the per diem in mind for both the lodging rate and any organized meal events.
- 5.) Review the contract. Pay close attention to the room rate, meal rate and cancellation fees and/or penalties. If everything is satisfactory, forward the contract to the procurement department with the specification sheet.
- 7.) You will receive the signed contract within 2-business days. Fax the contract to the vendor. Please keep one copy for your files and give one copy to the travel agent and one copy to the finance department.
- 8.) You will probably be asked to fill out a credit reference check. Pass this form to the finance department for processing.
- 9.) Fill out a Request for Advance sheet for the amount required as a deposit. Attach a copy of the signed contract. Please keep a copy of the request in your file.
- 10.) The receipt of the invoice for the event should trigger payment from the finance department.
- 11.) Identify each attendee with a partnership and provide a cost allocation method for other hotel costs, i.e. meeting rooms, meal functions.
- 12.) Forward detailed and complete invoice with cost allocation to the Finance Department to process payment.

SIGNED CONTRACT TO FINANCE DEPARTMENT & FILE:

_____ (Associate) _____ (date)

REQUEST FOR DEPOSIT SUBMITTED:

_____ (Associate) _____ (date)

INVOICE/BILL RECEIVED:

_____ (Associate) _____ (date)

INVOICE REVIEWED AND RECONCILED FOR
DISCREPANCIES:

_____ (Associate) _____ (date)

ROOM LIST DIVIDED BY PARTNERSHIP AND COST
ALLOCATION METHOD PROVIDED:

_____ (Associate) _____ (date)

COMPLETE INVOICE AND ROOM LIST FORWARDED TO
FINANCE:

_____ (Associate) _____ (date)

PAYMENT SENT:

_____ (Finance) _____ (date)