Event planning checklist

Use this checklist when planning your Data Analysis Retreat and Community Dialogue events.

PRE-PLANNING

☐ Secure a **LOCATION** that is big enough for the number of people coming, and one that is comfortable. Remember, you will have several small groups working simultaneously throughout the event, so having enough space and flexibility so groups aren't competing with one another is important. Make sure there is enough wall space, and that you may tape the big newsprint paper on the walls; or have a backup plan, like a whiteboard.

WHERE: first choice:_____ second choice:_____

WHO will be responsible for securing the location?:_____

WHEN do we need to have the location reserved?:_____

COST for the facility? ☐ no ☐ yes How much?_____

☐ Choose the **DATE** that you will hold the event. Make sure this is far enough in the future so you have enough time to recruit students and get all the necessary permissions, but not so far in the future that you lose steam.

WHEN: first choice:_____ second choice:_____

☐ Find out what **TRANSPORTATION** will be required if you have the event off-campus. If you're in a large school district, it's possible you'll have to arrange for a bus to take everyone from your school to the location of the event.

HOW will we get there?_____

WHO will be responsible for arranging the transportation?_____

WHEN do we need to have the transport arranged?_____

☐ Set aside enough **TIME** for the event. Include time required for transporting everyone to and from the event location. Be sure to include enough breaks and time for lunch.

START time: _____ **END** time: _____

SETUP time: _____ **CLEANUP** time: _____

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☐ Find out about any **PERMISSIONS** that will be required to have your retreat. Will you need the principal's approval for people to miss class that day? Will you need parents' permission for students to attend? Work with the adult at your school who is helping with this project to make sure all required permissions are in place before the event!

DO WE NEED PRINCIPAL PERMISSION? ☐ yes ☐ no

If YES, who will arrange this?_____

DO WE NEED PARENT PERMISSION? ☐ yes ☐ no

If YES, who will make the forms?_____

If YES, how will you hand them out and make sure you get them back?_____

DO WE WANT TO DOCUMENT AND SHARE PHOTOS OF OUR EVENT? ☐ yes ☐ no

If YES, who will confirm photo permission for those attending?_____

FOOD & BEVERAGES

Make sure you have enough food — snacks, lunch and drinks — available for everyone throughout the day. If you can, find out if anyone attending has any food allergies or sensitivities so you can plan the menu accordingly.

☐ **LUNCH** first choice:_____ second choice:_____

WHO will order this?_____ **HOW MUCH** will it cost?_____

☐ **SNACKS:** _____

WHO will get these?_____ **HOW MUCH** will it cost?_____

☐ **DRINKS:** _____

WHO will get these?_____ **HOW MUCH** will it cost?_____

PREPARATION

☐ To be sure you get a good **TURNOUT,** decide who you will invite and where you will advertise. Personal invitations followed up with written notes work best, but you may consider getting the word out with fliers or in the school newsletter or local paper.

WHO will you invite? _____

WHERE will you advertise? _____

WHO is responsible for each of the above? _____

☐ Plan your **AGENDA** and assign **ROLES** or a lead person for each section of the agenda. Be sure to rehearse any speaking parts and write up any notes or talking points you need.

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SUPPLIES & MATERIALS FOR THE DAY

- [ ] Nametags
- [ ] Markers
- [ ] Pens/pencils for people to write with
- [ ] "Fidgets," like chenille sticks or stress balls
- [ ] The goals for the day (listed on slides or a large piece of paper taped up)
- [ ] Copies of any handouts or activities (for icebreakers/energizers, voting sheets, etc.)
- [ ] Statements/Answers for NM-YRRS scale activity
- [ ] Tape
- [ ] Large paper or giant post-it/sticky pads
- [ ] Projector and laptop
- [ ] Circle of Courage quadrants & descriptions
- [ ] Root Causes and Solution t-charts
- [ ] Sign in sheet
- [ ] A phone or other device for pictures
- [ ] Facilitator agendas and talking points as needed
- [ ] Data strips, seperated by topic (Data Analysis Retreat only)
- [ ] NM-YRRS data for analysis at each station (Data Analysis Retreat only)
- [ ] Action planning sheets (2–4) (Data Analysis Retreat only)
- [ ] Executive Summary on slide and/or handouts (Community Dialogue Event only)
- [ ] _____
- [ ] _____
- [ ] _____

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