

Facilitation Logistics Checklist

This checklist is for use when facilitating events that include activities for in-person, virtual and hybrid events. If an activity is specific to an in-person event, virtual event, or hybrid event, it is identified as such.

Preparation

- Confirm whether the event will be virtual, in-person, or hybrid.
 - Request that event participants are asked about their accommodation needs during registration and the results are shared with the facilitator.
- Map out a plan to address accommodation needs of participants with the event host.
- Confirm responsibilities for facilitator, event host and technology host/support provider.
 - For virtual and hybrid events, confirm who will be the technology host for the event and what technology support will be provided.
 - For virtual and hybrid events, identify when meetings with the technology host will take place to review technology needs for the event and for the session speakers.
 - Initial meeting is required to review general technology needs for the event.
 - Subsequent meeting(s) may be required once event agenda and session speakers are confirmed.
- Identify number of expected event participants and when the number will be confirmed, i.e. when will registration close.
- Confirm number of sessions within the event.
- For each session, confirm:
 - Structure and flow of session, e.g. individual presentation(s), panel, interview, respondent(s), Q&A or breakout groups.
 - If breakout space is required, confirm number of rooms and any specific layout needed.
 - Name, title and affiliation of each session speaker and if necessary, bios.
 - If bios are to be used, identify length, e.g. 2-3 short sentences only.
 - How session speakers will be introduced, e.g. by bios or just name, title and affiliation.
 - Audio-visual/technology needs of each session speaker.



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- For virtual or hybrid event, identify timing for a meeting with each session speaker to review what they will be doing during the session and how the session will flow as well as to conduct a technology check; ideally, include all speakers for the same session in the same meeting.
- For in-person event, schedule a meeting with each session speaker to review what they will be doing during the session and how the session will flow; ideally, include all speakers for the same session in the same meeting.
- Confirm logistics for breakout rooms, e.g. number of participants per room and who should be together in the different breakout rooms.
 - Identify how facilitation will occur in the breakout rooms, e.g. event facilitators to facilitate, each group to self-facilitate or additional facilitators to facilitate.
 - If additional facilitators are required to facilitate, identify who they might be, how they will be asked to participate and how they will be oriented to their role.
- For in-person event, confirm set-up of main and breakout room(s), including accessibility requirements, e.g. space between tables for a wheelchair to pass.
 - Confirm if random or assigned seating for both main and any breakout rooms.
- For in-person event, confirm audio-visual/technology needs for the event (main and breakout rooms) and request necessary items from the event host:
 - whether event laptop will be supplied by the facilitator or event host
 - number of microphones wired: _____ and/or portable: _____
 - ability to project and hear video during PPT presentation yes or no
 - number _____ and placement of screens for PPT presentation
 - number of flip-chart stands with paper: _____
 - markers for each flipchart stand provided by: _____
 - masking tape (if paper is not self-adhesive) provided by: _____
 - number _____ and size of Post-its: _____
 - WiFi network: _____ and password: _____
 - extension cords/power outlets for screen/projector and event laptop
 - provided by: _____
 - length of cord(s) if known: _____
 - location of use, if known: _____



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- HDMI cable(s) of sufficient length to connect event laptop to screen/projector

- provided by: _____

- length of cord(s), if known: _____

- location of use, if known: _____

- For in-person event, confirm type of name tags to be used.
 - If blank, request that appropriate type and number of markers be available for writing.
 - If to be printed by event host, request that first name is larger than last name and if possible, include pronouns.
- Confirm if the event host has event participation guidelines, if they're distributed ahead of the event and how they will be managed during the event.
- Confirm if and how a land acknowledgement or other statements of solidarity will be done, e.g. how much time will be needed and if participants will have to have anything, such as a glass of water.
 - For in-person event, confirm if material (e.g. sage) will be burned as a part of a land acknowledgement, traditional opening or traditional closing.
- Confirm that there will be technology support on-site and available throughout the event.

Delivery

- For in-person event, arrive and request that the event host also arrives at least a half-hour before start of the event.
 - Ensure proper set-up of main and breakout room(s), including ensuring that all accessibility needs have been addressed.
 - Ensure materials are available, e.g. flipchart stand(s), flipchart paper and markers in main and breakout rooms as planned.
 - Ensure equipment and technology are working, e.g. microphones, laptop and projector(s).
 - Ensure presentations are loaded on laptop and ready to view.
 - Ensure signage is up and readable.
 - Ensure preparation has been done to meet accommodation needs.
- For virtual event, open virtual meeting platform for internal team only a half-hour before start of the event.



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- Request that facilitator and appropriate internal team members are made co-host.
- Ensure presenter privileges are enabled so that someone other than the co-hosts may present materials.
- Ensure technology is working, e.g. microphone and video.
- Ensure presentations, polls and any other tools to be used are loaded and ready to share.
- Ensure chat settings are as intended, e.g. whether participants can send private messages to one another or can copy text pasted into a chat.
- Ensure artificial intelligence (AI) settings are as intended, e.g. AI Companion turned off or on in virtual meeting platforms
- For hybrid event, complete the checklists for **both** in-person and virtual events above in the **Delivery** section, as well as:
 - Enable and test hybrid meeting technologies (e.g. cameras, microphones, etc.)
 - Ensure presenters and guests have information about how to interact across settings:
 - Online participants should unmute to ask questions place questions in chat
 - Chat monitoring and relaying provided by: _____
 - Decide if networking and/or breakout rooms will be hybrid or in-person/virtual (e.g., will breakout rooms be online for virtual participants and in-person for in-person participants, or is there sufficient technological support to allow for hybrid breakout rooms?)

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