**Event Timeline and Checklist**

This timeline and checklist should be used as a guideline when planning your next event or workshop. The information should be altered to fit the timeline of your event.

**4-6 Months**

* **Establish your event goals and objectives**
* Identify the reason for the event, objectives, what you are trying to achieve, reason for hosting
* **Select the date**
* Make sure it doesn’t conflict with other major events taking place at your institutions or major holidays
* **Identify venue and negotiate details**
* See appendix below on types of questions that you should ask when selecting a venue, including remote participation for hybrid events
* **Develop the agenda for the event**
* Determine how long time slots are for, how many speakers you have space for. Make sure to build in at least one to two 15–20-minute breaks every 2–3 hours.
* **Create budget**
* Items to include in your budget:
	+ Room/venue rental
	+ Food and beverage
	+ Equipment rental
	+ Speaker fee (if necessary)
	+ Travel for staff (flights, hotel, food)
	+ Insurance (if needed for venue)
* **Establish event committee**
* Identify committee chair
* Establish and subcommittees and chairs
* **Brand your event**
* Develop an event website
* Develop an event logo and tagline
* See appendix for what should be included in the website
* **Create a communication plan**
* Target audience
* Promotional email
* Social media
* **Identify and confirm speakers/presenters**
* Who will you invite to speak at the event?
* You will know how many people to invite once you know how many presentations slots you have in the agenda
* This includes all for participation in poster sessions, student sessions, etc.
* **Identify and contact sponsors**
* Create a list of sponsors who you want to contact
* Identify and create sponsorship tiers
* **Create registration form**
* Ensure registration forms are accessible and include the registration metrics that the Hub has established
* Determine if there will be an early-bird registration, if tickets are required
* See appendix for registration metrics that the Hub has established

**3-4 Months**

* **Speaker/presenter liaison**
* Collect title, abstracts, and bios from presenters
* Arrange travel accommodations for presenters if event is paying for speaker cost
* Encourage presenters to promote event on their social platforms
* Speakers sign media release document to post any recording on the conference website or YouTube
* **Venue and logistics**
* See appendix for venue room setup best practices
* **Continue to collect registrations**
* **Continue marketing and communications for event**

**1-2 Months**

* **Send final registration email out**
* **Confirm venue rental, sponsors, travel accommodations, speaker titles and abstracts**
* **Final promotional activities**

**1-3 Weeks**

* **Final food and beverage numbers to caterers**
* **Create timeline for the day of**
* When committee members, caterers, speakers need to arrive
* **Final registration count**
* Create name badges (if needed)
* **Confirm communications plan during the event**
* This includes social media posts and any press releases or stories that will be released during the event
* **Send final logistics email to attendees**
* Include any links to platforms if the event is online or hybrid
* Include agenda, event times, location, and any last-minute information items attendees need

**1 Day Before Event**

* **All necessary signage is in place**
* Directional signs to the event room
* Spaces are labeled if they are intended for breakout sessions
* **Ensure all AV equipment is tested and ready to go**
* **Send links to access the event remotely, if applicable**
* **Ensure all other event items are on-site**
* Promotional gifts for attendees, name badges, etc.

**Post-Event**

* **Send thank-you emails to all attendees that came to the event**
* In the email, highlight a few aspects of the event
* Include a post-event survey
* If the event will be held again in the upcoming year and you know the date, include a save-the-date notice
* **Send a post-event survey to attendees**
* See appendix for post-event survey questions
* **Move event to archives on website**
* **Upload any recordings to YouTube, and link to website**
* **Transcribe and caption recordings, if applicable**

**Appendix**

* **Schedule a kickoff meeting**
	+ During this meeting, you should select the event date(s), location, and time; determine budget; identify any committees and those members; determine how this event will be available: in-person, online, or hybrid; identify speaker(s), layout of the agenda, and how many breaks need to be scheduled; determine if lunch will be provided, who will be responsible for making sure refreshments are out when they are supposed to be, and who is the point of contact for the day of.
		- Depending on the size of the in-person event, the space should be booked 12–6 months in advance if there are specific dates the event needs to be held on.
		- If the event is on your institution's campus, then make sure to book a space 3–6 months prior.
		- When booking a space, things to consider and questions to ask:
			* Room size
				+ Will the room be large enough for the targeted audience size?
				+ Does the room have accommodation for those who require assistance?
				+ Can the room layout be tailored to the event needs? (i.e., can tables and chairs be moved to accommodate panel discussions, classroom-style layout, or other layouts that best suit the space?)
			* Cost
				+ What amenities are included in the room cost?
				+ Is there a minimum amount of time the room needs to be reserved for?
			* Equipment
				+ What media equipment is available to use?
				+ Will there be an AV tech on site to assist with any errors that might occur?
				+ What type of microphones are available?
				+ Are there video-recording capabilities?
				+ After the conference is recorded, where does the recording go?
				+ What Wi-Fi is available? Is the Wi-Fi an open network for attendees to join?
				+ What processes are in place if the wifi/power goes out?
				+ What arrangements need to be made to stream events live, allow remote attendees to participate as fully as possible, and/or record sessions for later viewing?
			* Other
				+ Are there breakout rooms available for networking or for meetings to be held in?
				+ What personnel will be on-site to assist with questions related to the conference set up, but not specifically conference content related?
				+ When and how are payments due? Is there a fee to reserve the room?
		- Identify who will present during the event.
			* Will there be a panel?
			* How many speakers will there be?
* **Invite presenter(s)**
	+ Send a formal email invitation asking them if they will present during the event.
	+ Once they confirm, request they send a title and abstract of their talk over to assist in event promotion.
* **Create event website**
	+ The call to action of the event, what the event is intended to do, who the audience is, and why attendees participate.
	+ Registration information and fees, lodging information, event location with address, and specific event hours; include any social events, agenda of the event, demographics of attendees, and link any historical events (if event is annual).
	+ If there are partnering organizations for this event, encourage them to link to the event website from their main website.
	+ Add the event to any online calendars and forums to assist in spreading the word.
* **Create registration link**
	+ Create a registration form. This is where you want to collect the specific registration data, determine if there are any dietary restrictions, etc.
* **Select goals and metrics for event**
	+ What are some of the metrics you want your event to tell you?
* **Start promotion of event**
	+ Email marketing, social media posts, digital marketing. Make sure all promotions have the event website, event name, event date(s) and time(s), and registration deadline.

**Event Metrics from the Midwest Big Data Innovation Hub**

Sugge*sted metrics to collect on your event registration form.*

**Registration Form**

**Demographics**

 Name {First, Last}

 Email {user defined}

 Geographic location {Within the U.S. - State abbreviation, Outside the U.S. - Country}

 Gender {Female, Male, Nonbinary, Prefer to self-describe, Prefer not to answer}

Race I identify as (select all that apply): {American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, White, Prefer to self-describe, Prefer not to answer}

Ethnicity I am: {Hispanic or Latinx, Not Hispanic or Latinx)

Please let us know if you would like to request an accommodation to {attend this event/participate in this activity}

**Sector**

 Job title {user defined}

 Institution/Organization {user defined}

 Sector {Academia, Industry, Government, Nonprofit}

**Academic Attendees**

 Primary Department and College {Primary Department and College}

 Secondary Department and College {Secondary Department and College}

 Academic institution type {4-year, 2-year, community college, TCU, MSI}

 Academic role {Undergrad student, graduate student, postdoc, faculty, staff}

**Non-Academic Attendees**

 Industry/Government subsector {user defined}

**Hub-Specific**

I consider myself most closely aligned with the following MBDH theme: Advanced Materials and Manufacturing, Digital Agriculture, Big Data in Health, Smart & Resilient Communities, Water Quality, Data Science Education and Workforce Development, Cyberinfrastructure and Data Sharing

**Post Event Metrics**

Post event metrics are a way to gage how successful the audience thought the event was. Below are some examples of post event survey questions to send to attendees after the event. It is best to send these questions immediately after the event and request for responses to be returned no more than 2 weeks after the event.

**Post-Event Survey**

 The two most important thing(s) I learned or took away from the meeting are:

 Did you feel that you had opportunities to ask questions and network with others?

 What would make this a better event?

 How do you see your work interacting with the work that the Hub is doing in the future?

**Testimonials**

 Name and institution: {from attendees, students, collaborators, etc.}

 Do we have your permission to post name on website? {Y/N}

 Do we have permission to use your photo? {Y/N}

 Testimonial: {user defined}

**Impact**

 Publications resulting from conversations that started during this event

 Publications involving at least one new collaborator

 New initiatives that were instigated (grants, workshops, project)?

**Hub Acknowledgment**

Our future funding depends on the success of building communities around data-driven solutions. We appreciate your acknowledgment in the acknowledgment sections of your papers and/or presentations. “This work has been supported in part by the Midwest Big Data Innovation Hub, NSF award #1916613.”

**Reporting**

Taking note of your audience members is very important! Collecting as much data as you can on the registration form is important for post-event reporting. It’s always interesting to see where your attendees are attending from, where they are geographically, what institutions, and how they attended; in-person or virtually. Collecting this data is always useful when planning the next event!

**Attendees Data Source**

 Total unique registrants From Registration forms

 Total unique attendees Zoom session (options: per event/day/conference)

 Total unique institutions Registration form

 Distribution of institution type Registration form