

LOGISTICS PLANNING CHECKLIST

ADMINISTRATIVE PLANNING

<u>CAPSO</u>	<u>Client</u>	
___	___	Define goals and objectives of event
___	___	Create timeline and scheduling of event
___	___	Plan agenda
___	___	Reserve meeting facilities (poster display, breakout rooms)
		<input type="checkbox"/> Houston Center <input type="checkbox"/> on-campus <input type="checkbox"/> off-campus _____
___	___	Reserve catering / food arrangements
___	___	Reserve lodging/lodging management
___	___	Arrange local transportation
___	___	Arrange for local housing for out-of-town participants
___	___	Arrange for guest speakers
___	___	Arrange for parking
___	___	Arrange for photographer for group picture
___	___	Arrange for tours (campus, Bush Library, art gallery, etc.)
___	___	Arrange for local/seasonal attractions
___	___	Set registration fees
___	___	Other _____

EVENT MARKETING

<u>CAPSO</u>	<u>Client</u>	
___	___	Determine market demand
___	___	Design of promotional logo
___	___	Design promotional materials (fliers, brochures, etc.)
___	___	Print promotional materials
___	___	Research market to identify target audiences
___	___	Obtain/purchase lists of target audiences
___	___	Direct mail (mark-the-date postcard announcements, conference brochures in hardcopy)
___	___	Broadcast (mark-the-date postcard announcements, conference brochures emails)
		Place print ads (newspaper, magazines, etc.)
___	___	Arrange for radio/TV ads and/or announcements (Paid/Free)
___	___	Place cyber ads and/or announcements (Paid/Free)
___	___	Design and upload event information on CAPSO Website
___	___	Maintain web information
___	___	Provide program testimonials
___	___	Solicit event sponsorships
___	___	Web page design
___	___	Web page maintenance
___	___	Procure promotional items and giveaways for participants
___	___	Creation of display boards
___	___	Other _____

EVENT REGISTRATION

<u>CAPSO</u>	<u>Client</u>	
___	___	Receive payments and transactions via online registration
___	___	Receive payments and transactions onsite (requires CAPSO rep. presence)
___	___	Provide daily reports on participant registration
___	___	Update electronic registration site (group discounts, specials, etc.)
___	___	Other _____

CONFERENCE LOGISTICS MANAGEMENT

<u>CAPSO</u>	<u>Client</u>	
___	___	Set up room
___	___	Create and organize nametags
___	___	Work the registration table on day(s) of event
___	___	Monitor event (throughout day/week)
___	___	Provide custodial services on day of event
___	___	Provide administrative support (copies, faxes, messages, local information)
___	___	Procure decorations
___	___	Photocopy event handouts
___	___	Collate handout materials
___	___	Organize participant registration bags
___	___	Create and send thank you notes or follow-up, if applicable
___	___	Other _____

EVENT FISCAL

<u>CAPSO</u>	<u>Client</u>	
___	___	Prepare event pricing, budget and draft MOA's/agreements
___	___	Set up registration/fiscal reimbursement plan
___	___	Transfer registration funds
___	___	Handle vendor payments/speaker fees
___	___	Other _____

TECHNICAL ASSISTANCE

<u>CAPSO</u>	<u>Client</u>	
___	___	Obtain / set up / remove presentation equipment
___	___	Provide AV support during event
___	___	Other _____

CERTIFICATE OF COMPLETION CREDENTIALS

<u>CAPSO</u>	<u>Client</u>	
___	___	Print certificates (obtain certificate paper)
___	___	Other _____

POST-EVENT MANAGEMENT

<u>CAPSO</u>	<u>Client</u>	
___	___	Collect, tabulate, and deliver participant evaluations
___	___	Prepare "post-conference report" to assess conference and ensure future success
___	___	Other _____

CAPSO OVERHEAD FEE

15-25% of total registration fees (negotiable)