



ACS In-Person Meeting Planning Checklist

At Advocacy & Communication Solutions (ACS), we know that strong strategy requires strong implementation. Whether you are convening partners, training advocates, aligning a coalition, or hosting funders, the logistics of your meeting directly shape participant experience and ultimately, outcomes.

This Meeting Planning Checklist is designed to help you think through the full range of details that make in-person gatherings run smoothly, from room setup and technology to participant communication and catering.

Why This Tool Matters

Well-run meetings:

- ▶ Signal professionalism and credibility
- ▶ Reduce stress for staff and speakers
- ▶ Create space for meaningful engagement
- ▶ Support accessibility and inclusion
- ▶ Minimize costly last-minute surprises
- ▶ Allow facilitators to focus on strategy

This checklist ensures that nothing critical is overlooked.

When & How to Use This Tool

This checklist is most useful:

- ▶ During initial venue selection and contracting
- ▶ 4–6 weeks before an event to confirm logistics
- ▶ 1–2 weeks prior to double-check final details
- ▶ As a day-of-event reference

A Note About Media Presence

If members of the media will attend (even informally) additional considerations apply. You may need to:

- ▶ Clarify whether the meeting is on/off the record
- ▶ Establish ground rules for recording and photography
- ▶ Prepare speakers with media messaging and talking points
- ▶ Designate an official spokesperson
- ▶ Coordinate press check-in and credentialing
- ▶ Ensure AV setup supports recording or livestreaming needs
- ▶ Review signage and background visuals for branding consistency

Media presence can meaningfully change tone, room dynamics, and risk considerations. Plan accordingly.



We recommend assigning a single team member to “own” the checklist while collaborating across roles (facilitation lead, communication lead, logistics coordinator, etc.).

For larger or higher-profile events, consider holding internal logistics review meetings beginning 8-10 weeks before the event, and walk through this checklist section by section at each meeting.

General Information

- Meeting title/purpose: _____
- Date(s): _____
- Time (including setup + breakdown): _____
- Expected number of participants: _____

Format:

- Meeting (generally with fewer than 25 people, meetings tend to prioritize shared dialogue and progress toward specific outcomes)
- Training (wide-ranging in terms of size, trainings focus on enhancing attendee skills and knowledge on *specific topics*)

Key Questions

1. What should the participant experience feel like? (formal, collaborative, energizing, reflective)

2. Will people need to move around or stay seated?

General Prep

- Completed venue/site visit (if possible)
- Created/confirmed run-of-show and shared with relevant vendors/site contact
- Confirmed venue and vendor contact information and availability

Venue Primary Contact Information

Name: _____

Title: _____

Phone Number: _____

Email Address: _____

Venue & Room Requirements

- Confirm venue address + entry instructions _____
 - Confirm room name/number _____
 - Verify room capacity: _____
 - Verify ADA accessibility (ramps, elevators, restrooms)
 - Verify room access hours (how long before and after our event can we be in the space?)
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Room Arrangement Needed

- Theater-style
- Classroom-style
- U-shape
- Rounds/small groups
- Boardroom
- Open circle

Other Space Needs

- Registration/check-in area
- Breakout rooms (how many?) _____
- Space for catering/coffee
- Separate workspace for speakers/staff

Key Questions

1. How many tables/chairs are available and what shape (e.g., rounds vs. conference table)?

2. Can furniture be moved/rearranged?

3. Is there enough space around the seating area for attendees to move around/engage with flipcharts/sit in small groups?

4. Is there enough wall space for posters or flip charts?

5. Are we allowed to stick flip charts on walls?

If not, is there access to easels?

6. Is/are there white boards?

7. If needed, is there a podium available?

8. If needed, is there a place to add a stage/raised area?

9. Where are the nearest restrooms? Can we access them without a key/keycard?

Audio/Visual & Technology

Projector + screen/TV

Laptop (provided by site, or can we bring our own?) _____

What adapters are needed to connect to/use the projector? _____

Clicker

Microphones needed? (Include how many) _____

Handheld

Lavalier

Table mics

Speakers/sound system

Reliable Wi-Fi (get network name + password) _____

Can we use Zoom to include remote participants? _____

Camera/mic for remote participants (can they see and hear the whole room?) _____

Key Questions

1. Whose computer will be used to share slides/presentation materials?

2. Is a remote available to control slides?

3. Who will troubleshoot tech onsite?

4. Is there onsite AV staff? Cost?

If onsite, capture contact information here: _____

Facilitation Materials & Supplies

- Printed agendas
- Name tents or badges
- Nametags
- Sign-in sheet
- Participant handouts
- Flip charts
- Easels
- Markers (flipchart-safe, not permanent)
- Sticky notes
- Dot stickers
- Pens at every seat
- Timer or time cards
- Table numbers or group assignments
- Organizational SWAG, if relevant/available

Catering & Food

Coffee/water available:

- Upon arrival
- Throughout event

Meals included

- Breakfast
- Lunch
- Snacks
- Dietary restrictions collected (vegan, gluten-free, allergies)

Serving style:

- Buffet
- Boxed meals
- Plated
- Timing coordinated with agenda breaks
- Trash/recycling plan

Key Questions

1. Where will food be served? _____

2. Can participants eat in the meeting room? _____

Catering Day-of Contact Information:

Name: _____

Title: _____

Phone Number: _____

Email: _____

Parking & Transportation

- Parking needed
 - Confirm cost
- Confirm transportation options to share with participants (e.g., where is parking available and does it cost anything? Are local public transit stations or bus stops nearby?)

Participant Communication & Prep

- Calendar invite sent
- Confirmation email sent with:
 - Address and room number/directions
 - Transportation and parking info
 - Arrival time
 - Agenda overview
 - What to bring/expect
 - ACS point of contact
 - Pre-reads/pre-work, if relevant
- Reminder email 1–2 days prior