



Outreach Event – Checklist

This is a checklist to assist with attending an outreach event. When organizing an event, there may be more set-up and steps that are required so be sure to customize this list to fit your agency’s needs depending on involvement and whether participating as host or attendee.

BEFORE THE EVENT		
<i>Prepare for an event using the following steps:</i>		<i>Comments:</i>
<input type="checkbox"/>	Event Strategy and Goals <ul style="list-style-type: none"> Identify your “why” Who is your target audience? What do you hope people will gain from attending? 	Work with your supervisor and staff/partners to clarify goals.
<input type="checkbox"/>	Budget and Cost <ul style="list-style-type: none"> Itemize and verify estimated costs Identify your budget Account for potential other contributors and possible reimbursement noting estimates. 	Consider potential cost impacts of any add-ons that may occur before or during the event.
<input type="checkbox"/>	Coordinate with other agency/partner events.	Consider others attracting the same audience or those that can help expand your audience to new areas and different businesses.
<input type="checkbox"/>	Formalize your event plan.	Document event details and be prepared to discuss everything listed above under Event Strategy and Goals.
<input type="checkbox"/>	Inform participants of event expectations.	Consider bargaining agreements/policies and work schedules.
<input type="checkbox"/>	Inform and invite your audience. Your audience may include customers, contract holders, and potential diverse bidders you want to attend.	Consider diverse stakeholders and markets to maximize awareness and opportunity. Make the invitations personalized when possible.
<input type="checkbox"/>	Register and/or pay for the event.	Coordinate with appropriate staff.
<input type="checkbox"/>	Transportation: Coordinate any carpool and/or transportation needs if necessary.	Fleet vehicle resource page
<input type="checkbox"/>	Complete travel approval for attendees if required.	Work with your agency travel authority.



<input type="checkbox"/>	For larger events, hold an event pre-meet with all key participants.	Make sure all participants from your agency are on the same page and understand their role(s) for the event. Discuss any outstanding pre-event needs.
<input type="checkbox"/>	Plan for all needed equipment and reserve as necessary with your IT services team.	Laptops, mi-fi (portable wi-fi), cameras, portable projector, etc.
<input type="checkbox"/>	Check out an “events kit” if you have one or gather helpful items to ensure a professional presentation.	Tablecloth, signs, handouts, business cards, etc.
<input type="checkbox"/>	Collect, create, or coordinate event handouts and/or presentations and talking points.	If new handouts or presentations are needed, develop with Communications. When using existing materials, be sure to regularly check with Communications for updates and relevancy.
AFTER THE EVENT		
<input type="checkbox"/>	Thank attendees (if agency hosted), share digital event materials/additional resources, and complete post-event survey.	Create your survey on sites such as Survey Monkey or Google Forms for agency-hosted events.
<input type="checkbox"/>	Schedule & facilitate a post-event debrief meeting with all agency staff who attended the event.	Share feedback received, lessons learned, provide expected data collected, note decision-making info for future attendance decisions/adjustment.
<input type="checkbox"/>	Submit travel through TEMS , as needed.	Verify that it meets original approved amounts.
<input type="checkbox"/>	Follow up with contacts from the event.	Reach out to new contacts to expand your network. Consider including these contacts in future events.
<input type="checkbox"/>	Recognize your outreach team for their efforts, and document results.	Recognition promotes positive morale, engagement, and momentum. Noting successes on metrics will help verify event value.
<input type="checkbox"/>	<p>Reflect:</p> <ul style="list-style-type: none"> • Review survey results • Determine if you met your goals and objectives i.e., Did you make meaningful connections with diverse businesses that can fulfill your agency’s spending needs? • Note decisions for future participation and ideas to streamline the processes 	Use this information to ensure continuous improvement for future events.