



Workshop Logistics Guide

This document provides information to help you successfully plan your workshop. We provide information about facilities, meals, materials and supplies, speaker management, and travel. We recommend reading over this document before you start your workshop planning and refer back to it as needed.

This guide can also help you formulate an informal planning budget, which can be maintained using spreadsheet software such as Microsoft Excel or Google Sheets. The budget is generally influenced by the size and scope of your event.

Facilities

The venue you select will play a key role in the success of your workshop. It is important to cultivate a welcoming and positive ambiance with a clean, well-lit, centrally located, accessible space. Begin your reservation process as soon as possible as many other logistics will depend on your location.

Event venue fees are a major budget category. Common event venue expense categories to discuss with your event vendor include fees for room reservations, equipment, furniture, and clean-up.

Room Reservations

- Room reservations vary in size, layout, technical capacity, price, and accessibility. Research your selected venue to ensure adequate accommodations before signing a contract or placing a deposit.
- Choose space(s) that are accessible for guests with impairments and/or disabilities (sound, sight, mobility, etc.).
- Reserve the room for at least one hour before, and one hour after your event starts and ends. This will allow you enough time to setup and cleanup.
- Complete setup at least 30 minutes before the event so guests that arrive early feel welcomed.



Audio/Visual (AV) Equipment

- Check with your venue early in your planning process about AV policies and pricing. Required items may include laptops, computer clickers, projectors, projection screens, audio cables, ethernet cords, extension cords, microphones, speakers, wi-fi access, and/or video recording equipment.
- Arrange all required AV equipment at least four to six weeks before your event. Some venues will provide AV equipment for a fee, whereas other venues may require you to borrow equipment from an external department or company.

Furniture

- Most venues provide necessary furniture for events, but double check all details before securing your space.
- We recommend using 60 or 72-inch round banquet tables to encourage community building and discussion. Round tables are also excellent for small group activities and meals.
- Reserve podiums, registration tables, refreshment/catering tables, chairs, trash and recycling receptacles, and tablecloths.

Meals

It is important to provide meals, snacks, and/or beverages to guests free of charge as it encourages greater attendance and cultivates a positive event atmosphere. It also facilitates greater networking as guests centralize around food and beverage stations and often linger after the event to continue conversations. Most, if not all, event attendees will have extremely busy schedules and will appreciate a delicious and well-coordinated meal.

Catering is often one of the largest workshop expenses. Common catering expense categories to discuss with your food vendor include menu fee structure (does the company charge per person or according to another metric, such as per platter or per gallon?), beverage service, plates, utensils, napkins, delivery fee, wait staff fee, and gratuity.

Dietary Restrictions

- Arrange at least one vegetarian entree per meal. Request that guests forward other dietary restrictions at least one month before your event to help ensure all guests can partake in the meals or snacks.
- Be sure to communicate all restrictions to your caterer and verify that accommodations will be arranged well ahead of time.
- Place printed food labels or tents with dish names, ingredients, and dietary considerations (e.g., gluten-free, vegan) in front of each dish during meal times.



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Last edited by LiY! 09/21/2015.

Kitchen Access

- Discuss with your caterer whether they need access to a kitchen or running water for food prep and reheating purposes.
- The venue's kitchen capabilities may impact catering decisions.

Meal Tables

- Catered meals require a lot of space! Ask the caterer to specify their required table space for meal presentation.
- Reserve at least three six-foot rectangular tables for each meal, and at least one six-foot rectangular table for beverages.

Snacks and Beverages

- When hosting a day-long event, we recommend providing morning and afternoon snacks. We also recommend providing beverages including coffee, tea, and water for the entirety of your event.

Materials and Supplies

Office supplies

- Order supplies four to six weeks before your event to prevent last-minute order mistakes or shipping delays.
- Order items such as binders, binder inserts, pens, name tags, and thank you notes.
- Factor office supplies into your workshop budget.

Printing

- To ensure that your materials have a consistent and professional appearance and prevent you from unexpectedly running low on paper and/or toner, we recommend that you use a professional company for printing the workshop materials. Submit your files to the printing company at least three days before your event.
- If you do not have the budget for professional printing, allow a few extra days to print and collate workshop materials.
- Factor printing costs into your workshop budget.



Speaker Management

Speaker Assistants

If a speaker has an assistant, make sure that the assistant is included in all correspondence and remains cognizant of important decisions and details such as event logistics, receipt of materials deadlines, and presentation instructions.

Payment & Gifts

Determine whether you will provide speaker payments, honoraria, or gifts before you invite anyone to speak at your event. Some speakers may have predetermined fees, whereas others may prefer to negotiate or forego payment. Complete any required contracts four to six weeks prior to your event. Regardless of payment arrangements, it is a nice gesture to offer your speakers a small thank you gift during the event. This may include something as simple as promotional items or a small gift from your institution's bookstore.

Travel

Hotel Reservations

- Some speakers, attendees, and/or program staff may travel to attend your workshop. Be sure to reserve a block of rooms at a local hotel if more than five attendees will require lodging.
- Check per diem lodging rates for your location before reserving lodging as many institutions require guests to stay within the per diem rate.

Managing Travel Arrangements

- Arrange airfare as early as possible as prices are likely to rise as your event approaches. Most institutions and grants will cover only economy class tickets--not first class or business class tickets.
- Check the per diem meal rate for your location and communicate these rates to your guests prior to your event.
- Provide navigation information, such as maps, to help guests travel between the event location and other places such as the local hotel or airport.

Reimbursements

- Review your institutional travel guidelines several weeks before your event and determine the relevant information to share with traveling attendees. There may be limitations on certain expenses (such as baggage) or required documentation needed for reimbursement (such as written explanations to accompany ground travel receipts).



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- Clearly communicate these details to attendees in one message before your event rather than approaching them in a piecemeal fashion, which could prove confusing and frustrating to your guests.
- Create a checklist or brief guide to help you and the traveler keep track of the reimbursement details and to simplify processing the reimbursements.

Evaluation

Professional evaluation staff may charge a fee for evaluating your program. Potential evaluation expense categories to discuss with your evaluation team include evaluation personnel time, supplies, software, and travel.



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