

# CE Committee Checklist for Events

## Event Information

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Title of Event: \_\_\_\_\_

Type of Event: \_\_\_\_\_

Date: \_\_\_\_\_

Budget: \$ \_\_\_\_\_

## Pre-Event Planning

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**Check the following links for conflicts:**

(Click the link)

[LLC Calendar](#)

[Midwest Collaborative for Library Services](#)

[Michigan Cooperative Directors Association](#)

[Michigan Library Association](#)

[MeL Training and Events](#)

[Library of Michigan](#)

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**Presenter Information:**

Name: \_\_\_\_\_

Handouts/Materials/Equipment needed

Contact info: \_\_\_\_\_

Fees

Speaking \$ \_\_\_\_\_

Mileage

Travel/hotel/meals

Available Dates: \_\_\_\_\_

Written confirmation to record webinar by presenter (if applicable)

Time needed to present: \_\_\_\_\_

Confirmation received

Other: \_\_\_\_\_

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**Location Contact:**

(For webinars)

Name: \_\_\_\_\_

Contact [tech-help@llcoop.org](mailto:tech-help@llcoop.org) for Zoom link and meeting setup options.

Contact Info: \_\_\_\_\_

Breakout sessions

Save chat session

Record session

Review host features and responsibilities

Space available

# of people can accommodate

Reservation made

Rental costs if required

Contact additional persons to monitor chat/questions (optional)

Equipment needed

**Save the Date Promotion (as soon as you have the event date and title set):**

- Send title/subject and date to [kelly@llcoop.org](mailto:kelly@llcoop.org)

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**Calendar Creation/Flyer Promotion (approx. 3 – 4 weeks in advance of event):**

- Submit [Calendar/Flyer Form](#) to [kelly@llcoop.org](mailto:kelly@llcoop.org)
- Email Michlib-L (no attachments – send info in email along with link to LLC calendar - <http://llcoop.evanced.info/signup>)
- Register facilitators and presenters for the event
- Email PDF/calendar link to [llc\\_all@llcoop.org](mailto:llc_all@llcoop.org)
  - Email registration starting
  - Email reminder
  - Added to Social Media unless specified not to
- Add notification to calendar entry and emails (if applicable)

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**Materials (approx. 1 week in advance of event):**

- Agenda (optional)
- Signage
- Name Tags (from LLC)
- Sign-in Sheet (from LLC)
- Registration Contact List (from LLC)
- Survey sheets or Survey Monkey link/QR Code (from LLC)
- Copies of handouts (if applicable)
  - Sent to LLC 7 days prior to event with # copies and specs
  - Done in own library and billed to LLC with # and cost/page
  - Add to website or sent via email
- Other:

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**Meal Planning/Refreshments (if applicable):**

- Check with location for area vendor recommendations
- Coffee service
- Other beverages (water, tea, soda)
- Snacks (am and/or pm)
- Calculate cost per attendee
- Note on Flyer Form/Calendar Reg.
- Confirm with caterer
  - Menu
  - Time of meal
  - Registration numbers
  - Dietary restrictions
  - Pick-up or delivery
  - Deposit/Payment due date

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**Webinar or Zoom Info (2-3 days prior):**

- Give Zoom link and info to [kelly@llcoop.org](mailto:kelly@llcoop.org) for entry into the event reminder from the calendar
  - Email Zoom link to attendees
  - Include link to survey info with a deadline for completion
  - Include handouts or link (if applicable)
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## Date of Event

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### Item Checklist:

- Attendance/Sign-in list
- Name Tags (including facilitators and presenters – be sure to register)
- Survey sheets/Link/QR Code
- Signage
- Agenda (optional)
- Refreshments
- Handouts
- Contact information for
  - Presenters
  - Caterer

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### Registration/Webinar Login/Event:

- Collect payment with any non-members indicated by LLC
- Sign in on attendance list
- Introduction and instructions
- Facilitate Q&A at the end of the presentation

(For webinars)

- Greet and select Presenter(s) as Co-Host(s)
- Monitor start time
- Record the total number of participants for the meeting
- Start recording (if permitted)
- Monitor sound problems (mute)
- Monitor chat for problems and questions

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## Follow-Up After the Event

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### After the Event (within 2 days):

- Send attendance list (or count) and sign/extra materials to LLC
- Email survey reminder
- Send paper surveys to LLC (if applicable)
- Summarize evaluations (LLC)
- Prepare report for next CE meeting
- Send thank you and feedback to the Presenter(s)
- Provide recording of session to participants (if permitted)
- Follow-up on requests or questions from participants

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### Expenses (within 2 weeks):

- Send [reimbursement form](#) with receipts to LLC (make copies if needed)
  - Send any vendor bills to LLC
  - Receive expense report from LLC to report at next CE meeting
  - Total expenses \$\_\_\_\_\_
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## Budget and Expenses

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### Prior to Event:

- Expenses calculated are under budget
  - Print or download [reimbursement form](#) to complete
  - All expenses accounted for
  - Prepayments or checks needed before event are –
    - Requested 2 weeks prior
    - Received and sent/given to vendor
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### Check which expenses will be incurred:

- Refreshments
  - Handouts
    - Materials
    - Copies
  - Caterer
    - Deposit
    - Meal
  - Location rental
  - Speaker
    - Fees
    - Mileage
    - Travel
    - Hotel
    - Meals
    - Other
  - Other:
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### After Event:

- Bills and [reimbursement forms](#) w/receipts sent to LLC
  - Received expense report from LLC
  - Under/Over budget (circle)
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