

TT&E EVENT CHECKLIST

Event Title: _____ **Primary Event POC:** _____

Event Date: _____ **Alternate Event POC:** _____

| No. | Activity/Task | Lead POC(s) | Status/Remarks | Completed (enter √ with date) or N/A |
|---------------------------------------|--|-------------|----------------|--------------------------------------|
| Event Development and Planning | | | | |
| 1 | Determine purpose, objectives, and concept (format). | | | |
| 2 | Obtain management approval on concept and schedule. | | | |
| 3 | Develop detailed schedule/timeline with milestones. | | | |
| 4 | Determine event location(s) and reserve space, as appropriate. | | | |
| 5 | Announce/distribute approved dates and location(s) to all personnel involved in effort. | | | |
| 6 | Draft invitation/event announcement for participants and individuals involved in conduct of event. <ul style="list-style-type: none"> ▪ Include suspense date for attendees' names and required information (e.g., clearance status, Social Security numbers, and requirement for transportation to the event site). ▪ Provide directions/map to training location, if applicable. ▪ Provide information on lodging/billeting and meals, if applicable. ▪ Provide any special security requirements or instructions, including name and fax number of security representative to whom clearance information should be submitted, if necessary. | | | |

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| 7 | Obtain management approval of invitation/event announcement and finalize announcement at least 1 month before the event. | | | |
| 8 | Distribute invitation/event announcement at least 3 weeks before event. | | | |
| 9 | Develop documentation/materials required to support event in accordance with approved schedule: <ul style="list-style-type: none"> ▪ Concept & Objectives Paper ▪ Event Plan ▪ Evaluation Plan ▪ Agenda ▪ Slides ▪ Participant Observation Form/Critique Form ▪ Handouts/Participant Packets ▪ Facilitator Books Add other documents/materials as required based on nature of event. | | | |
| 10 | Coordinate with guest speakers and presenters, if applicable. <ul style="list-style-type: none"> ▪ Provide copy of approved agenda. ▪ Advise them of their allocated briefing/presentation timeframe. ▪ Request copies of their materials for inclusion in briefing slides and participant packet and indicate suspense date for these. ▪ Request list of their equipment/supply requirements and indicate suspense date for these. ▪ Provide lodging/billeting information, if applicable. ▪ Provide directions/map to training location, if applicable. ▪ Obtain speaker biography for introduction at the event. | | | |

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| 11 | Confirm space and dates with training location point of contact (POC). | | | |
| Administration | | | | |
| 12 | Create attendee list/roster. <ul style="list-style-type: none"> ▪ Update list as necessary. ▪ Forward all updates to other applicable POCs for administration, event site, transportation, security, and IT/communications, as applicable. | | | |
| 13 | Create list of individuals requiring lodging/billeting. | | | |
| 14 | Complete and submit travel authorizations, if applicable. | | | |
| 15 | Make travel arrangements as necessary. | | | |
| 16 | Distribute read-ahead materials to rostered attendees according to approved concept and/or schedule. Include any site-specific information as necessary. | | | |
| 17 | Prepare/obtain nametags and name tents, if applicable, for rostered attendees. (Prepare extra nametags and tents to have on hand.) | | | |
| 18 | Identify and notify individual(s) to staff the administration desk/sign-in table at the beginning of each day of the event. <ul style="list-style-type: none"> ▪ Provide individual(s) with phone numbers of training site POCs (e.g., billeting/lodging, security, transportation, and IT/communications). | | | |

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| 19 | Prepare and pre-position sign-in sheet/attendance roster for each day of the event. <ul style="list-style-type: none"> ▪ Provide copy of the completed sign-in sheet to the individuals preparing the After-Action Report. ▪ Provide copy of the completed sign-in sheet to the building POC if applicable. | | | |
| 20 | Identify individuals to serve as recorders (i.e., note takers) during the event. | | | |
| 21 | Determine requirements for escorts/guides and designate personnel, as applicable. | | | |
| 22 | Prepare appropriate number of copies of event materials and distribute these at event. | | | |
| 23 | Distribute Participant Packets/handouts on first day of event. | | | |
| 24 | Collect Participant Observation Forms/critique forms at the end of the event. <ul style="list-style-type: none"> ▪ Provide box or container for collection purposes. ▪ Provide copy of the completed forms to the individuals preparing the After-Action Report. | | | |
| 25 | Collect notes/comments from recorders at the end of the event. <ul style="list-style-type: none"> ▪ Forward these to the individual(s) preparing the After-Action Report. | | | |

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| Site Logistics | | | | |
| 26 | Coordinate with building POC at event site/visit site before event. <ul style="list-style-type: none"> ▪ Determine existing equipment and resources. ▪ Identify any additional equipment and resources that will be required. Provide list of requirements and supplies to building POC. ▪ Determine best room layout/arrangement based on agenda and number of attendees. ▪ Determine if location is accessible to participants with disabilities if applicable. | | | |
| 27 | Coordinate with cafeteria/food service POC at the training site, if applicable. | | | |
| 28 | Coordinate with billeting/lodging POC at event site. <ul style="list-style-type: none"> ▪ Forward copy of updated attendee lists as received. ▪ Obtain information (e.g., cost and location) on alternative lodging options, if necessary. | | | |

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| Transportation | | | | |
| 29 | Determine if transportation to training site is required. If yes: <ul style="list-style-type: none"> ▪ Determine number of personnel to be transported. ▪ Identify any special access transportation needs. ▪ Forward requirements to site transportation POC. ▪ Devise transportation schedule (i.e., marshalling point, departure time from marshalling point, return schedule) in coordination with site transportation POC. | | | |
| 30 | Determine if onsite transportation is required. If yes: <ul style="list-style-type: none"> ▪ Determine when transportation will be required and number of personnel to be transported. ▪ Identify any special access transportation needs. ▪ Forward requirements to site transportation POC. | | | |

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| Information Technology/Communications | | | | |
| 31 | Coordinate with IT/communications POC at event site. <ul style="list-style-type: none"> ▪ Provide list of IT/communications requirements based on event agenda and attendee list. ▪ Request IT/communications specialist(s) to be available throughout the day to provide assistance as needed. | | | |
| 32 | Designate individual with responsibility for ensuring that IT and communications equipment is set up and operational on day of event. <ul style="list-style-type: none"> ▪ Advise individual of time to arrive on site. ▪ Provide individual with phone number of IT/communications POC at event site. | | | |
| Security | | | | |
| 33 | Coordinate with site security POC. <ul style="list-style-type: none"> ▪ Advise of classification level and location (e.g., building and room) of event. ▪ Provide any attendee information needed by security staff. ▪ Determine special security concerns associated with event (e.g., special passes or badges, classified computer, classified material, etc.). | | | |

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| 34 | Identify individual who will courier classified event materials to the site, if necessary. | | | |
| 35 | <p>Ensure appropriate measures are in place during event to protect classified and “For Official Use Only” (FOUO) information.</p> <p>Develop procedures for dissemination and collection of materials and distribute to staff members who will participate in conduct of event.</p> <ul style="list-style-type: none"> ▪ Coordinate storage for classified materials, for overnight or temporary storage. ▪ Perform security check of room(s) at conclusion of each day of event. | | | |