Pacific Institute
for Climate Solutions

EVENT PLANNING CHECKLIST

How to host impactful climate events



INITIAL PLANNING | 3-6 months out

- [ ] **Define your goal and target audience**
  - [ ] What is the event purpose? Who do you want to participate?
- [ ] **Develop a budget:** Make a spreadsheet listing potential costs and revenue sources (e.g. space rental, ticket sales).
- [ ] **Set the date and time:** Check the availability of speakers or key participants and conflicts with other events.
- [ ] **Select and book a venue:** Check date availability, capacity, accessibility and availability of amenities. For hybrid and virtual events, confirm tech needs.
- [ ] **Identify key partners/ collaborators:** Confirm priority speakers, presenters, or facilitators.
- [ ] **Insurance and special permits:** Check to see if any special permits or liability insurance may be required.

LOGISTICS | 2-3 months out

- [ ] **Plan and delegate:** List tasks and delegate responsibilities for each item.
- [ ] **Meet with partners** to confirm roles and maximize each other's strengths.
- [ ] **Book speakers, facilitator and contract services:** Finalize contracts for food, audio-visual, speakers or entertainment.
- [ ] **Confirm Land Acknowledgement speaker** and prepare speaking notes if necessary.
- [ ] **Identify potential VIPs** or special guests.
- [ ] **Confirm venue details:** Finalize venue details (start and end times) and plan layout for seating and activity areas.
- [ ] **Confirm equipment needs:** Tables, chairs, A/V systems. Confirm availability with venue, arrange additional equipment if needed.
- [ ] **Plan for honorariums:** Determine payment, if any, for participants or speakers
- [ ] **Prep speakers:** Provide direction to speakers/participants about focus of presentations or sessions, including any specific questions to be addressed and what is in or out of scope for any engagement sessions.

LOGISTICS (CONTINUED) | 2-3 months out

- [ ] **Recruit volunteers** if needed, confirm number of volunteers needed and what tasks they will be assigned.
- [ ] **Plan for accessibility and inclusivity:** Review venue accessibility, review participant or speaker accessibility requests, prepare special signage or translation services if needed, arrange parking or rides if necessary.
- [ ] **Plan security and safety:** Identify risks and create a safety plan.

PROMOTION | 1-2 months out

- [ ] **Make event visuals:** Create an event poster that can be customized to different sizes for print and social media promotion
- [ ] **Launch registration:** Set up an online RSVP or ticketing page. Eventbrite is an easy-to-use and inexpensive option.
- [ ] **Promote!** Use social media, community flyers, local newspapers, and email newsletters. Follow up repeatedly to continue promotion up until the event.
- [ ] **Prepare targeted invitations** for key participants and VIP's

FINAL PREPARATIONS | 1-2 weeks out

- [ ] **Confirm Everything:** Re-confirm with venue and caterer (with final numbers).
- [ ] **Finalize "Run of Show":** Create a minute-by-minute schedule including MC, introductions and closing.
- [ ] **Prepare signage, materials and an agenda** for participants (include the event name and logo to avoid confusion).
- [ ] **Send reminder to speakers with the final agenda** to confirm timing, location and presentation length.

EVENT DAY

- [ ] **Setup/Tear Down:** Arrive early for setup and plan who is responsible for clean up afterwards.
- [ ] **Mic check:** Final check of room setup and A/V (test microphones, slide decks, and any video feeds).
- [ ] **Manage activities:**
  - [ ] Manage volunteers and assign to task such as greeting and registration.
  - [ ] Assign someone to take photos/video at the event (on a phone will do).
  - [ ] Ensure notes are being taken to capture engagement/key themes.
  - [ ] Enjoy yourself and engage with the community.
- [ ] **Evaluation and feedback:** Make time near the end of the event for participants to fill out an event evaluation or feedback form. Get creative, offer a prize for completed forms.
- [ ] **Reinforce a take home message:** Close on a positive note and reinforce a message of how participants can take action or stay engaged.

POST-EVENT | 1-2 months out

- [ ] **Send thank you notes** to speakers, partners, volunteers and sponsors.
- [ ] **Review feedback and debrief:** Review participant feedback and organize a debrief with the event team to reflect on what worked well and what didn't.
- [ ] **Finalize financials:** Wrap up the budget by entering final costs and revenues
- [ ] **Celebrate:** Update webpage and social media with event photos and metrics to celebrate your event successes
- [ ] **Follow up with participants:** Send updates to participants summarizing highlights of the event and any actions or next steps you'd like them to take. Highlight opportunities for ongoing engagement and any 'quick wins' or updates following the event.

Pacific Institute
for Climate Solutions

FACILITATION TIPS

For hosting impactful climate events





PICS-funded GOERT 2025 Garry Oak Ecosystems Gathering

① START RIGHT

- In event promotions make it easy to understand the event goals, intended audience and activities.
- Use event registration to find out about participants' organizations, roles, and what they hope to get out of the event.
- Before the event, send a reminder with an agenda or added details on the speakers and activities.

② WARM WELCOME

- Arrive early and make the space feel organized and inviting.
- Use music, visuals, or refreshments to create a positive atmosphere.
- Make sure participants are greeted personally as they arrive.
- Use name tags to help people connect quickly.
- Start with a friendly, upbeat tone to reduce anxiety.
- Clearly explain the purpose and agenda of the event.

③ INVITE PARTICIPATION RIGHT AWAY

- Begin with a simple icebreaker or quick activity that invites people to introduce themselves and get to know each other.
- Set expectations that participation is welcome and encouraged.
- Use easy opening questions, polls, chat prompts, or sticky notes for quick engagement.
- Avoid long introductions before interaction begins.

④ MIX UP FORMATS

- Alternate between presentations, discussions, and activities.
- Include pair shares or small-group breakouts to maintain engagement.
- Balance structured content with open conversation.
- Use hands-on exercises to reinforce learning and collaboration.
- Match the rhythms of the day—use movement-based activities after lunch or in the afternoon to avoid fatigue; close the day on a positive note.

⑤ SUPPORT NETWORKING

- Networking is a highlight for many participants, build networking time into the agenda intentionally.
- Use guided introductions or conversation starters.
- Encourage participants to connect with someone new.
- Create small-group rotations to increase interaction.
- Provide shared activities that spark natural conversation.
- Offer digital networking spaces or contact-sharing options.







PICS-funded SFU Housing that connects us 2024.

⑥ NAVIGATE TENSIONS CALMLY

- Set ground rules for respectful communication at the beginning.
- Stay neutral and avoid taking sides if conversations get tense.
- Acknowledge emotions without escalating the tension.
- Use calm, steady body language and tone of voice.
- Reframe negative comments into constructive discussion points.
- Focus on shared goals or common interests.
- Pause briefly if emotions become too heated.
- Summarize key points to reduce misunderstandings.
- Keep discussions focused and avoid unrelated conflicts.
- Use empathy to validate concerns while maintaining boundaries.
- End with clear next steps or agreements when possible.
- Follow up afterward if additional support or clarification is needed.

⑦ CLOSE WITH GRATITUDE

- Thank participants sincerely for their time and contributions.
- Highlight key achievements or memorable moments.
- Recognize speakers, volunteers, or organizers in closing remarks.
- Invite final reflections or takeaways from the group.
- Leave attendees feeling energized and valued.

⑧ FOLLOW UP AFTER THE EVENT

- Send a thank-you message within a few days—share slides, notes, recordings, or resources and summarize key outcomes and action items.
- Encourage continued discussion or networking—highlight upcoming opportunities and ways to stay connected through email, social platforms, or community groups.

Pacific Institute
for Climate Solutions

EVENT EVALUATION

For impactful climate events



After all the work of planning and running an event, participant feedback forms can feel like a low priority. Nothing could be further from the truth. Participant feedback provides actionable insights to improve future events.

Don’t skip this important step!

Feedback helps measure success, understand attendee satisfaction, identify areas for improvement, and gives participants a way to share their suggestions for future events.

TIPS TO INCREASE EVALUATION ENGAGEMENT

- **Don’t think of feedback as a burden**

  Asking participants to share their feedback and ideas for future events is an important way to build relationships and trust between event audiences and organizers. Approach the ask for feedback as a positive moment of the day—let folks know you value their opinions, and you'll be using what they share to plan for the future.

- **Make it easy**

  Use an online survey tool to collect participant feedback. Tools like Microsoft Forms, Slido, Menti and Survey Monkey offer free or low-cost options where participants can connect to forms by scanning a QR code from their phone. Online surveys are easy for participants to fill out and may automatically analyze responses for you.

- **Build in the time**

  To maximize feedback, make evaluation part of your agenda. Sending a survey link after the event or posting the QR code as participants head out the door won’t be effective. Show participants their feedback matters by providing the time and space for them to reflect and write their thoughts during the event.

- **Create an incentive**

  Use evaluations as a chance to do something fun. Pass around a plate of cookies for an end of day sugar boost or hand out tickets for a closing raffle as folks complete their forms. Even playing music can lighten the mood and energize participants as they reflect on the day and shift to thinking about what comes after the event wrap-up.

QUESTIONS TO ASK

The key to an effective event evaluation form is to keep questions concise and focused on information you can use for reporting and future event planning. Keep things brief. Up to 10 questions is ideal, so every question included has to be valuable.

Measure success

- Use a simple star rating to ask about attendee satisfaction
- Asking how likely they are to participate in a future event can also be a good indicator of event satisfaction
- If you have specific engagement goals, ask questions to gauge how well they were achieved.
  - Some examples: Did they gain new knowledge on X topic? What is something new they learned they'll take away with them? Did they connect with someone new they could collaborate with in future?
- Test how demographics affect event experience by asking which audience category the participant fits in
  - For example: Are they a student, professor or community member?

Optimize future logistics

- Ask for specific insights on logistical issues like registration, venue accessibility or session timing with a question that ranks satisfaction

Understand what they valued

- Ask what aspects of the event they valued most by ranking satisfaction for event components, such as speakers, topic and networking.

Ask how to improve

- Include an open-ended question for what could be improved for next time
- Ask what topics or formats they would be interested in for future events

Gather testimonials

- Ending with an open-ended question prompting further comments and reflections is a great way to gather positive feedback and quotes to promote future events and report back to funders and partners.

FEEDBACK SURVEY TEMPLATE

Copy these questions for quality responses you can learn from right away. Use whichever survey tool works best for you, some survey platforms include SurveyMonkey, Google Forms, Microsoft Forms, etc. See an example survey here.

① What category best describes your sector or role?

- Academic researcher or staff
- Government/ Public sector
- Private sector
- Non-profit/ NGO
- Student
- Community member
- Presenter or panelist
- Other

② What motivated you to join the event (Select all that apply)

- Interest in the topic
- Speaker profile
- Dialogue or discussion opportunities
- Networking
- Building community
- Other

③ Overall how satisfied were you with the event?

★ ★ ★ ★ ★

④ Please indicate how strongly you agree or disagree with each statement.

	Completely agree	Somewhat agree	Neutral	Somewhat disagree	Completely disagree
The event ran smoothly					
I made a new connection(s)					
I was able to contribute my perspectives & knowledge					
The event was collaborative & inclusive					
I felt my time & efforts were appreciated					

⑤ Is there a new learning or valuable take away you gained today? If so, please tell us more about it.

FEEDBACK SURVEY TEMPLATE (CONT)

⑥ **Is there something that did not go well or suggestions you have for improving future events?**

⑦ **Do you have suggestions for future events? (For example, topics, speakers or formats you'd like to see)**

⑧ **Would you join one of our events again?**

- Yes
- No
- Maybe

⑨ **Is there anything else you would like to share?**

Pacific Institute
for Climate Solutions

RESOURCE LIST

How to host impactful climate events



TIPS FOR HOSTING COMMUNITY EVENTS

- **Webinar:** Engaging community events with Janet Webber and Seth Erais. Hosted by the SFU Knowledge Mobilization Hub, February 20, 2022.

IMPROVING ACCESSIBILITY AND INCLUSIVITY

- **Training module:** Accessible and Inclusive Event Planning for Knowledge Mobilization from Research Impact Canada

  The purpose of this module is to provide individuals and organizations with practical tips, resources, and the skills needed to host an accessible and inclusive event. Events are a great way to help mobilize your knowledge to different groups. By planning events that are accessible you can ensure that all attendees have an equitable opportunity to fully participate and you are able to engage with a diverse range of stakeholders.

- **Guide:** Equity, Diversity and Inclusion Guide for Events from Simon Fraser University

  This guide was created to help make SFU's events inclusive and accessible to all. This list is not exhaustive, and we recognize its lengthiness. We do not expect you to accommodate each suggestion. Rather, we suggest that you use this guide as a tool to help you plan, integrate, and adapt your events to acknowledge EDI at SFU.

- **Checklist:** Accessible Events Checklist and Resources from City of Vancouver

INCREASING ENGAGEMENT

- **Toolkit:** Public Engagement Toolkit from Simon Fraser University

  This toolkit is designed to support high-quality public engagement by governments and institutions, and the implementation of Public Engagement Strategies. At the core of the toolkit is a commitment to enacting a set of five principles for collaborative public engagement, which are described in more depth within the kit.

  - Work in partnership with communities
  - Include participants reflecting the full diversity of interests and perspectives
  - Increase shared understanding
  - Create conditions for actionable public judgment
  - Commit to transparency about purposes, methods & outcomes

- **Toolkit:** Holding Space: A Community Engagement Toolkit, from Simon Fraser University

  Offering the principles that guide our work and the methods behind what we do, it was designed as a blueprint to support others at post-secondary institutions in developing their own community engagement initiatives. However, its contents should be valuable to any community-serving organization.

  The toolkit includes:

  - The case for community engagement at post-secondary institutions
  - Practical methods for accessible and inclusive programming and communications
  - Examples of effective student engagement
  - Case studies that demonstrate the real-world impact of our collaborations
  - A year-by-year continuum of work to help develop a community engagement program
  - Further resources

WHAT MAKES A GOOD PHOTO

PICS encourages the use of visuals to communicate your story and impact. Photos can convey powerful messages about community engagement, climate action, professional development, and personal growth. Here are some guidelines to help you capture powerful images that align with PICS' communications strategy.

1 Action shots



- Capture moments where people are interacting with their environment and/or each other.
- Focus on actions related to your event or project, like workshops, fieldwork, community gatherings, or presentations.

2 Community



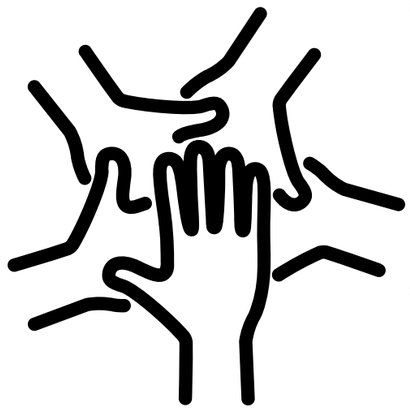
- Capture groups of people in action from different angles, highlighting diversity and teamwork.
- Avoid static group photos with everyone smiling at the camera or shaking hands—aim for natural, candid moments instead.

3 ProD



- Capture interns or participants engaged in learning moments —whether in meetings, workshops, or hands-on work.
- Capture people interacting with mentors and community, using equipment, or presenting.

4 Diversity & Inclusion



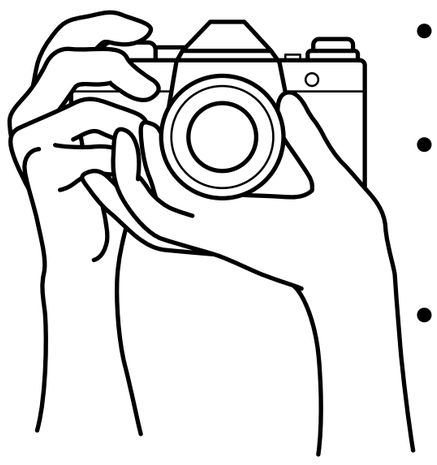
- Show a range of ages, backgrounds, and roles in your photos. Diversity in images helps convey that climate action involves everyone.
- Focus on people with varied expertise or community members working together on shared goals.

5 Environment



- Photograph your event or project within its physical environment. Show landscapes, buildings, or infrastructure that relate to your climate action.
- Make sure that your shots place individuals in their surroundings, so that the place is part of the story.

6 Lighting & Composition



- Use natural light to avoid harsh shadows or overexposure.
- Follow the rule of thirds by placing your subject off-centre for a more engaging image.
- Avoid cluttered backgrounds that may distract from the main subject.

FINAL PHOTO TIPS



1

Take multiple shots

Taking multiple photos of key moments will give you more options to choose from!



2

Get permissions!

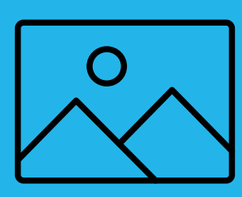
Ensure permissions are obtained for all identifiable individuals in your photos.



3

Craft a caption

Draft suggested captions for each image and include who to credit for the photo.



4

Horizontal is best

Prioritize horizontal shots for greater flexibility in usage on different platforms.