

Strategy Offsites: A Practical Guide to Design and Facilitate Transformative Events

Venue and Logistics Checklist

1. Venue Selection

Location and Accessibility:

- ☐ Choose a venue that is convenient for all participants, whether in-person or virtual.
- ☐ Ensure the venue is easy to access, with clear directions and adequate parking or public transportation options.

Capacity and Room Size:

- ☐ Confirm that the venue can comfortably accommodate your group, including any breakout spaces required.
- ☐ Ensure the meeting room has enough space for presentations, discussions, and any interactive activities.

Ambiance and Environment:

- ☐ Choose a venue that fosters creativity and focus. Natural lighting, comfortable seating, and a quiet atmosphere can contribute to a more productive offsite.
- ☐ Consider the venue's ability to offer an atmosphere free from distractions, such as in a dedicated conference space or retreat center.

On-Site Facilities:

- ☐ Confirm that the venue has the necessary on-site facilities, such as restrooms, breakout rooms, and areas for meals and coffee breaks.
- ☐ Check whether the venue offers additional services like concierge support or on-site IT assistance.

2. Room Setup

Room Layout:

- ☐ Determine the best room layout for your offsite (e.g., U-shape, boardroom, theater style, or breakout tables).
- ☐ Ensure that the seating arrangement promotes interaction and visibility for all participants during presentations and discussions.

Breakout Spaces:

- ☐ If your agenda includes smaller group discussions, make sure the venue provides adequate breakout rooms or spaces where participants can gather in smaller teams.
- ☐ Check that breakout rooms have the necessary equipment (e.g., whiteboards, flip charts, screens) to support collaboration.

Comfort and Amenities:

- ☐ Ensure that the meeting room has comfortable seating, proper ventilation, heating, or air conditioning, and adjustable lighting.
 - ☐ Provide essential supplies, such as pens, notepads, and whiteboard markers, for participants.
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3. Technical and Audio-Visual Requirements

Projectors and Screens:

- ☐ Ensure the venue has high-quality projectors and screens for presentations. Confirm that all equipment is in working order and compatible with your devices.
- ☐ Test the projector and screen setup in advance to avoid technical issues during the event.

Microphones and Sound Systems:

- ☐ If the room is large or has poor acoustics, ensure that microphones and sound systems are available. Test the audio setup to confirm that all participants can hear clearly.
- ☐ For virtual participants, make sure the sound quality is optimized for remote attendees to hear in-room discussions.



Video Conferencing Tools (if hybrid or virtual):

- ☐ Set up the necessary video conferencing tools (e.g., Zoom, Microsoft Teams, WebEx) if remote participants will join virtually.
- ☐ Test the video conferencing system in advance, ensuring that both in-person and virtual attendees can participate fully.
- ☐ Confirm that cameras, microphones, and screens are set up to allow seamless communication between in-person and virtual participants.

Wi-Fi and Internet Connectivity:

- ☐ Confirm that the venue has reliable, high-speed Wi-Fi that can support the needs of all participants, including streaming, presentations, and file-sharing.
- ☐ Ensure that internet access is available in all breakout rooms if they are being used.

Adapters and Charging Stations:

- ☐ Ensure the availability of power outlets and charging stations for laptops and mobile devices.
- ☐ Provide adapters if necessary, especially if international participants are attending and need power converters.

4. Accommodations and Transportation (if applicable)

Accommodation for Out-of-Town Participants:

- ☐ If the offsite spans multiple days or includes participants traveling from out of town, book accommodations near the venue.
- ☐ Ensure that accommodations are comfortable and meet the needs of attendees, including breakfast, parking, and Wi-Fi.

Transportation Arrangements:

- ☐ Arrange transportation for participants if needed, such as shuttle services from the airport, hotel, or train station to the venue.
- ☐ Provide clear directions and transportation details to participants in advance, including parking information and public transport options.

5. Catering and Dietary Considerations

Meals and Refreshments:

- ☐ Arrange catering for meals, snacks, and refreshments. Consider the timing of meals to coincide with breaks in the agenda.
- ☐ Confirm that catering includes a variety of options to suit different tastes and dietary needs.

Dietary Restrictions:

- ☐ Ask participants in advance if they have any dietary restrictions (e.g., vegetarian, vegan, gluten-free, allergies) and ensure that these preferences are accommodated.
- ☐ Provide a variety of beverages, including water, coffee, tea, and non-caffeinated options.

Food Service Logistics:

- ☐ Confirm that food and beverages will be served on time, with sufficient space for participants to eat comfortably.
- ☐ Plan for snack stations or coffee bars for participants to refuel between sessions.

6. Materials and Supplies

Presentation Materials:

- ☐ Ensure all presentation materials (e.g., slide decks, handouts, reports) are prepared in advance and distributed to participants. If using digital formats, make sure participants have access to shared documents via platforms like Google Drive or Dropbox.
- ☐ Provide printed copies if necessary, especially for key documents like agendas or data sheets.

Stationery and Supplies:

- ☐ Provide notepads, pens, flip charts, and markers for participants to take notes or contribute to interactive discussions.
- ☐ Ensure that any other required supplies, such as sticky notes for brainstorming or whiteboard markers, are readily available.

7. Contingency Planning

Technical Backup:

- ☐ Plan for technical issues by bringing backup equipment, such as spare laptops, projectors, adapters, or microphones.
- ☐ Ensure that an on-site IT support person is available to troubleshoot any issues that arise during the offsite.

Weather and Venue Accessibility:

- ☐ If the venue is affected by weather (e.g., remote locations, outdoor settings), have a backup plan in place for delays or cancellations.
 - ☐ Ensure that the venue is fully accessible for participants with mobility challenges or other special needs.
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8. Communication and Coordination

Pre-Event Communication:

- ☐ Send a detailed email or document to all participants with logistical information, including venue address, start times, parking, transportation options, and contact details for event coordinators.
- ☐ Include a copy of the agenda and any pre-work materials to ensure participants are fully prepared for the offsite.

On-Site Coordination:

- ☐ Assign someone to act as the logistics point of contact during the offsite. This person will handle any last-minute issues, coordinate with the venue staff, and ensure that everything runs smoothly.
 - ☐ Provide participants with contact details in case they need assistance or directions on the day of the event.
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9. Post-Event Logistics

Clean-Up and Wrap-Up:

- ☐ Ensure that any materials, equipment, and personal items are packed up and removed from the venue after the offsite.
- ☐ Coordinate with the venue staff for any clean-up or equipment return that may be required.

Post-Event Follow-Up:

- ☐ Send a thank-you note to participants and share any post-event materials, including meeting summaries and action plans.
- ☐ Confirm with the venue that all costs are settled, and provide feedback to them on the experience, especially if you plan to use the venue for future offsites.