



☒ Event Checklist

Twelve Months or More Out

- Enlist an organized person to keep track of everything below.
- Set up a cloud computing site like Dropbox where everyone can access planning info through the Internet.
- Create and gather your planning committee.
- Assign responsibilities to planning committee members.
- Prepare schedule of planning meetings.
- Determine event goals and objectives.
- Identify possible dates.
- Identify guest constituencies.
- Estimate number of attendees.
- Review possible event sites, conducting site visits if necessary.
- Select top sites and begin site negotiations. Popular venues often book a year in advance.
- Prepare a preliminary agenda.
- Establish planning and promotional timelines.
- Review last budget for similar event and adjust for this event.
- Review and evaluate past, current, and potential funding sources.
- Establish theme and preliminary graphics.
- Outline specific requirements for
 - Audio & Visual
 - Lighting
 - Insurance
 - Decorations; need professional decorator?
 - Catering
 - Entertainment
 - Floral arrangements
 - Furniture, props and equipment
 - Media relations/public relations
 - Photography
 - Printing
 - Registration
 - Security
 - Speakers
 - Bilingual personnel
 - Otherservice providers
 - Invite and confirm speakers, including people within your organization.

By Six Months Out

- Prepare and mail sponsorship/funding requests.
- Determine final program and schedule for all events.
- Obtain audiovisual needs from speakers and presenters.
- Determine food and beverage needs.
- Negotiate menus and prices.
- Sketch floor plan.

By Three Months Out

- Do some PR for the event, including press releases.
- Monitor budget.
- Continue solicitation of sponsors.
- Solicit and confirm volunteers and staff helpers.
- Send event listing to your city newspapers for their running calendar of events.
- Firm up menu selections.
- Send Save the Date cards to all invitees.
- Think about whether or not it is appropriate to present gift(s) to speaker(s) and other important guests.
- Order necessary rental furniture and equipment.
- Ensure that any signage/plaques will be ready in time for your event.
- Order gifts, awards and related materials.
- Review sponsorship monies and pledges received.



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One Month Out

- Identify and assign staff and volunteer on-site responsibilities.
- Order any flowers required for the event.
- Begin preparation of event briefing and of written instructions for event workers.
- Prepare list of needed signs and delegate their production.
- Send invitations with firm RSVP date. Know that fewer people each year reply to say no.
- Identify and communicate on-site responsibility areas to committees and volunteers.

One Week Out

- Review RSVP's. Call anyone you really want to attend who hasn't replied yet, including your own executives.
- Distribute briefing notes.
- Distribute written instructions to all volunteers and staff working actual event.
- Prepare registration lists and review badge preparation process.
- Reconfirm all vendors.

Day Before Event

- Review assignments, list of expected deliveries and vendors and so on.
- Monitor preparation of registration lists and badges.
- Brief head registrar.

Day of the Event

On Site 3 to 8 hours before event

- Receive and inventory all shipments, equipment, and supplies.
- Confirm and monitor delivery of all rental equipment and supplies; confirm pickups after event.
- Reemphasize communication lines and responsibility levels to staff, vendors and volunteers.
- Walk through venue and check for:
 - Contact personnel
 - Stage risers
 - Open loading dock.
 - Band area
 - Ceiling treatment
 - Outside lobby area
 - Directional signage
 - Easels, displays

On Site 1 to 2 hours before event

- Conduct briefings for registration staff, volunteers, and others.
- Walk through venue and check for:
 - Photographer
 - Video Camera Operator
 - Audio/Visual/Lighting Technicians
 - Centerpieces
 - Balloon Bouquets
 - Buffets – Décor and Signage
 - DJ or Band

Immediately After the Event:

- Pack and inventory all material.
- Prepare and mail thank-you letters.
- Do financial reconciliation of the many invoices and payments.
- Perform post-budget performance review. Were you on budget? Could you have saved money?
- Obtain evaluations from staff, volunteers, and consultants - all important for improvement.