**EVENT PLANNING CHECKLIST**

Print off this checklist and use it to remember everything you need to leading up to your event

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|  | **Done** | **Person  Responsible** | **Approx. Hours  To Complete** | **Due** |
| **4 – 6 Months Ahead of Event** | | | | |
| Establish Your event goals and objectives |  |  |  |  |
| Select the Date |  |  |  |  |
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| **Get Cost Estimates**  Room Rentals  Room Rentals  Room Rentals  Room Rentals  Room Rentals |  |  |  |  |
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| Establish Your event goals and objectives |  |  |  |  |
| Identify and contact sponsors/partners |  |  |  |  |
| Determine if you need event registration software to make the process easier |  |  |  |  |
| Determine if you need other event management software |  |  |  |  |
| Release early-bird tickets |  |  |  |  |

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| **3-4 Months Ahead of Event** | | | | |
| Build out required documents for your team |  |  |  |  |
| **Speaker/presenter/entertainer liaison**  Finalize presentation/speech topics  Get bio information, photo  Travel & accommodation arrangements  Have contracts signed if appropriate  Ask speakers to start promoting and sharing it with their network |  |  |  |  |
| **Determine if you need event registration software to make the process easier**  Determine registration fees  Set up and enable online registration  Finalize sponsor levels and amounts  Identify items to be underwritten and accounting tracking details |  |  |  |  |
| **Venue and logistics planning**  Determine and arrange all details re menu, A/V equipment, registration set-up, parking, signage, etc.  Review security needs/plan for the event with venue manager  Investigate need for any special permits, licenses, insurance, etc.  Assess accessibility requirements and communicate to staff |  |  |  |  |
| **Follow publicity plan**  Develop draft program  Create draft event script  Develop publicity pieces  Request logos from corporate sponsors for online and printed materials  Develop and produce invitations, programs, posters, tickets, etc.  Develop media list & prepare News Release, Media Advisory, Backgrounder and all media kit materials  Enable/create email event notifications  Create a Facebook event page  Develop a promo video and post on YouTube and your Facebook page  Register your event on a variety  of online event calendars  Create some buzz on your blog or member forums  Determine VIPs and create invitation & tracking document  Order any desired event swag |  |  |  |  |

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| **1-2 Months Ahead of Event** | | | | |
| Send reminders to your contact list registration and participation |  |  |  |  |
| **Reach out again to presenters/speakers regarding**  Confirming travel and accommodation details  Request copy of speeches and/or. Presentations |  |  |  |  |
| **Sponsorship finalization**  Follow up to confirm sponsorships and underwriting  Get any promotional materials you’ll be sharing at the event  Ask sponsors to share event on their promotional channels |  |  |  |  |

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| **Continue executing on your publicity plan**  Release press announcements about keynote speakers, celebrities, VIPs attending, honourees, etc.  Post your initial event news release on your website and circulate to all partners, affiliated organizations, etc.  Post more details about your event on social media |  |  |  |  |
| Close early-bird tickets |  |  |  |  |
| Finalize and proofread printed materials |  |  |  |  |

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| **1 Week Ahead of Event** | | | | |
| Have all committee chairs meet and confirm all details against Master Plan |  |  |  |  |
| **Finalize event script**  Ensure it includes wheelchair-accessible areas and has clear paths through the venue |  |  |  |  |
| Brief any/all hosts, greeters, volunteers about their event duties and timelines |  |  |  |  |
| Finalize your seating plan |  |  |  |  |
| Provide final registration numbers to caterer |  |  |  |  |
| Make print and online copies of any speeches, videos, and presentations |  |  |  |  |
| Do a final registration check, including name badges & registration list |  |  |  |  |
| Determine photo op and interview opportunities with any presenters and VIPs. |  |  |  |  |
| Confirm details with media attendees |  |  |  |  |

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| **1 Day Before the Event** | | | | |
| Have all committee chairs meet and  confirm all details against Master Plan |  |  |  |  |
| **Finalize event script**  Ensure it includes wheelchair-accessible areas and has clear paths through the venue |  |  |  |  |
| Brief any/all hosts, greeters, volunteers  about their event duties and timelines |  |  |  |  |
| Finalize your seating plan |  |  |  |  |
| Provide final registration numbers to caterer |  |  |  |  |
| Make print and online copies of any  speeches, videos, and presentations |  |  |  |  |
| Do a final registration check, including  name badges & registration list |  |  |  |  |
| Determine photo op and interview  opportunities with any presenters and VIPs. |  |  |  |  |
| Confirm details with media attendees |  |  |  |  |

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| **Event Day!** | | | | |
| Take a few deep breaths — you got this! |  |  |  |  |
| Ensure you have copies of all instructions |  |  |  |  |
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| Check in with each Committee Chair to  ensure their team is on track |  |  |  |  |
| Greet new attendees |  |  |  |  |

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| **Post Event Follow Up** | | | | |
| Ensure nothing was left behind  at the venue |  |  |  |  |
| **Finalize event script**  Gather all receipts and documentation, final  registration data, etc.  Update budget |  |  |  |  |
| **Send thank-yours and acknowledgement**  **letters to**  Sponsors  Volunteers  Speakers/presenters  Donors  The media |  |  |  |  |
| **Post-event publicity**  Send out an email to your subscriber base with highlights from the event  Make a publicity reel video  Share highlights on social media  Update website page to reflect that it’s a past event |  |  |  |  |
| Conduct a post-event survey |  |  |  |  |
| Reach out to event participants |  |  |  |  |
| Conduct a team debrief to learn  their thoughts |  |  |  |  |
| Conduct a thorough evaluation of the event |  |  |  |  |