**Event Planning Checklist**

Please note this is provided in word format so that you can edit the checklist to work for your needs.

**High Level Planning**

\*start your planning as early as possible.

* Establish event goals and objectives
* Select date
* Identify venue and negotiate details
* Develop Event Master Plan
* Get cost estimates (e.g., room rental, food & beverages, equipment, speaker fees, travel, etc.) and create a budget
* Recruit event committee,  event manager or chair and establish sub-committee chairs
* Create and launch publicity plan & brand your event (ensure staff and/or volunteers are identified to manage specific tasks – e.g., media relations, VIP coordination, printed material design & printing coordination, signage, online /social media, etc.)
* Identify and confirm speakers/presenters/entertainers
* Identify and contact sponsors/partners

**3-4 Months Ahead of Event**

* Speaker/presenter/entertainer liaison: e.g.:
	+ Finalize presentation/speech topics
	+ Get bio information, photo
	+ Travel & accommodation arrangements
	+ Have contracts signed if appropriate, etc.
* Financial/Administration: for example, determine:
	+ Registration fees
	+ Set up/enable online registration
	+ Sponsor levels/amounts
	+ Identify items to be underwritten and accounting tracking details
* Venue/logistics planning, e.g.:
	+ Investigate need for any special permits, licenses, insurance, etc.
	+ 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
* Publicity:  Follow publicity plan, e.g.,
	+ Develop draft program
	+ Create draft event script (e.g., MC, speaker introductions, thanks, closing, etc.)
	+ Develop publicity pieces -- e.g., newsletter articles and/or ads, radio spots, print blog posts articles for submission to other publications and/or ads, etc.
	+ 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 (e.g., speaker info, photos, etc.)
	+ Create event page on your website
	+ 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 (e.g., spreadsheet)

**2 months prior to event**

* Send reminders to contact list re registration/participation
* Presenters/Speakers: e.g.:
	+ Confirm travel/accommodation details
	+ Request copy of speeches and/or presentations
	+ Sponsorship: Follow up to confirm sponsorships and underwriting
* Publicity:
	+ Release press announcements about keynote speakers, celebrities, VIPs attending, honorees, etc.
	+ Post your initial event news release on your website and circulate to all partners, affiliated organizations, etc.

**1 week ahead**

* Have all committee chairs meet and confirm all details against Master Plan – and ensure back-up plans are developed for any situation (e.g., back-up volunteers as VIP greeters, additional volunteers for registration or set-up, etc.)
* Finalize event script
* Brief any/all hosts, greeters, volunteers about their event duties and timelines
* Final seating plan, place cards, etc.
* Provide final registration numbers to caterer
* Make print and online copies of any speeches, videos, presentations, etc.
* Final registration check, name badges & registration list
* Determine photo op and interview opportunities with any presenters, VIPs etc. and confirm details with interviewee and media

**1 day ahead**

* Confirm media attending
* Ensure all signage is in place
* Ensure registration and media tables are prepared and stocked with necessary items (e.g., blank name badges, paper, pens, tape, stapler, etc.)
* Ensure all promo items, gifts, plaques, trophies, etc. are on-site

**Event day**

* Ensure you have copies of all instructions, directions, phone numbers, keys, extra parking permits for VIP guests, seating charts and guest lists with you
* Check-in with each Committee Chair to ensure their team is on track

**Immediately following event**

While you need to conduct a thorough evaluation and update your budget, there are post-event publicity, fundraising and member development opportunities that you can take advantage of with just a little pre-event planning. Here are some of the activities you might consider once the event is over:

* Financial status: gather all receipts, documentation, final registration data, etc. and update budget
* Send thank-you’s and acknowledgement letters to:
	+ Sponsors
	+ Volunteers
	+ Speakers/presenters
	+ Donors
	+ the Media

*In your thank-you notes, be sure to remind the recipients of the event’s success – and how they contributed (e.g., dollars raised, awareness - number of participants, etc.).*

* Post-event publicity – see publicity section that follows
* Conduct a Post-Event Survey – to learn what people enjoyed about your event, and where you have room to improve.
* Follow-up Communication with Event Participants
* Reach out to event participants – thank them for participating and promote your ongoing programs and how they can support you throughout the year by joining, volunteering or making a sustaining donation.
* Conduct a thorough evaluation