



## Event Planning Checklist

### 6 to 12 Months Prior to Event

| Yes | No |  |
|-----|----|--|
|     |    | Decide event purpose (raise funds, visibility, celebration, etc.)        |
|     |    | Choose a theme   |
|     |    | Research/appoint an event coordinator/manager                            |
|     |    | Research/select committees/chairpersons                                  |
|     |    | Chairperson forms subcommittees  |
|     |    | Get cost estimates (site rental, catering, sound/lights, etc.)           |
|     |    | Get recommendations for entertainment; hold auditions                    |
|     |    | Get bids for entertainment   |
|     |    | Get bids for decorations   |
|     |    | Get bids for design/printing   |
|     |    | Finance committee drafts initial budget                                  |
|     |    | Decide on admission cost   |
|     |    | Create sponsorship amounts/levels  |
|     |    | Research/approach honourees  |
|     |    | Compile mailing list (individuals/businesses)                            |
|     |    | Check proposed date for potential conflicts, finalize date in writing    |
|     |    | Get written contracts for site, catering etc.                            |
|     |    | Consider pre-party event for publicity                                   |
|     |    | Invite/confirm VIPs  |
|     |    | Pick graphic artist; begin invitation design                             |
|     |    | Create logo for event with graphic artist                                |
|     |    | Order event announcements  |
|     |    | Set marketing/public relations schedule                                  |
|     |    | Develop press release and critical path calendar                         |
|     |    | Select photographer; arrange for photos of VIPs, chairmen, honourees etc |

|  |  |  |
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|  |  | Get biographical information on VIPs, celebrities, honourees, chairmen |
|  |  | Investigate need for licenses, insurance, etc.                         |

### 3 to 6 Months Prior to Event

| Yes | No |   |
|-----|----|---|
|     |    | Begin monthly committee meetings  |
|     |    | Write/send requests for funding to major donors, corporations, sponsors |
|     |    | Request logos from corporate sponsors for printing                      |
|     |    | Review with graphic artist invitations, programs, posters, etc.         |
|     |    | Prepare final copy for invitations, return card, posters                |
|     |    | Prepare final copy for tickets  |
|     |    | Complete mailing lists for invitations                                  |
|     |    | Order invitations, posters, tickets, etc.                               |
|     |    | Sign contract with entertainment  |
|     |    | Finalize mailing lists  |
|     |    | Obtain lists from honourees, VIPs                                       |
|     |    | Obtain radio/TV sponsors, public service announcements, promos          |
|     |    | Confirm menu  |
|     |    | Secure permits and insurance if required                                |
|     |    | Get written confirmation of celebrity participation/special needs       |
|     |    | Finalize audio/visual contract  |
|     |    | Select/order trophies/awards  |

### 2 Months Prior to Event

| Yes | No |  |
|-----|----|--|
|     |    | Hold preview party to coincide with mailing of invitations; invite media |
|     |    | Assemble/address invitations (with personal notes when possible)         |
|     |    | Mail invitations   |
|     |    | Distribute posters   |
|     |    | Finalize transportation/hotel accommodations for staff, VIPs             |
|     |    | Obtain contracts for decorations and rental items                        |
|     |    | Confirm TV/radio participation   |

|  |  |  |
|--|--|--|
|  |  | Release press announcements about celebrities, VIPs, honourees       |
|  |  | Follow up to confirm sponsorships                                    |
|  |  | Obtain logos from corporate sponsors for program printing            |
|  |  | Review needs for signs at registration, directional, etc.            |
|  |  | All major chairpersons to finalize plans                             |
|  |  | Hold walk-through of event with responsible committees               |
|  |  | Review/finalize budget, task sheets                                  |
|  |  | Start phone follow-up for table sponsors (corporate, VIP, committee) |

| 1 Month Prior to Event |    |   |
|------------------------|----|---|
| Yes                    | No |   |
|                        |    | Phone follow-up of mailing list (ticket sales)                          |
|                        |    | Place newspaper ads, follow up with news media, on-air announcements    |
|                        |    | Confirm staff for registration, hosting, etc.                           |
|                        |    | Write to VIPs, celebrities, program participants, confirm participation |
|                        |    | Complete list of contents for VIP welcome packets                       |
|                        |    | Get enlarged site plan/room diagram, assign seats/tables                |
|                        |    | Give estimate of guests expected to caterer/food service                |
|                        |    | Meet with all outside vendors, consultants to coordinate event          |
|                        |    | Review script/timeline  |
|                        |    | Continue phone follow-ups for ticket/table sales                        |
|                        |    | Continue assigning seats; set head table, speaker's platform            |
|                        |    | Confirm transportation schedules: airlines, trains, buses, cars, limos  |
|                        |    | Confirm hotel accommodations  |
|                        |    | Prepare transportation and accommodations                               |
|                        |    | Confirm special security needed for VIPs, event                         |
|                        |    | Prepare welcome packet for VIPs, chairmen, and key staff                |
|                        |    | Schedule deliveries of special equipment, rentals                       |
|                        |    | Confirm setup and tear down times with event site                       |
|                        |    | Finalize plans with party decorator                                     |
|                        |    | Give caterer revised numbers  |
|                        |    | Meet with chairpersons, key staff to finalize any of the above          |

| 1 Week Prior to Event |    |   |
|-----------------------|----|---|
| Yes                   | No |   |
|                       |    | Meet with all committees for last-minute details                  |
|                       |    | Finish phone follow-ups   |
|                       |    | Confirm number attending  |
|                       |    | Finish seating/table arrangements                                 |
|                       |    | Hold training session with volunteers; finalize assignments       |
|                       |    | Secure two or three volunteers to assist with emergencies         |
|                       |    | Finalize registration staff                                       |
|                       |    | Distribute seating chart, assignments to hosts/hostesses          |
|                       |    | Schedule pickup or delivery of any rented or loaned equipment     |
|                       |    | Double-check arrival time and delivery times with vendors         |
|                       |    | Reconfirm hotel, transportation                                   |
|                       |    | Deliver final scripts/ timelines to all program participants      |
|                       |    | Finalize catering guaranteed numbers                              |
|                       |    | Confirm number of volunteers                                      |
|                       |    | Make follow-up calls to news media for advance and event coverage |
|                       |    | Final walk-through with all personnel                             |
|                       |    | Schedule rehearsals   |
|                       |    | Schedule volunteer assignments for day of event                   |
|                       |    | Establish amount of petty cash needed for tips and emergencies    |
|                       |    | Write checks for payments to be made for the day of the event     |

**1 Day Prior to Event**

| Yes | No |   |
|-----|----|---|
|     |    | Lay out all clothes that you will need the day of the event   |
|     |    | Recheck all equipment and supplies to be brought to the event |
|     |    | Have petty cash and vendor checks prepared                    |

**Event Day**

| Yes | No |   |
|-----|----|---|
|     |    | Arrive early (with your change of clothes)                  |
|     |    | Unpack equipment, supplies and make sure nothing is missing |
|     |    | Be sure all VIPs are in place and have scripts              |
|     |    | Reconfirm refreshments/meal schedule for volunteers         |
|     |    | Go over all the final details with caterer and setup staff  |
|     |    | Check with volunteers to make sure all tasks are covered    |
|     |    | Setup registration area                                     |
|     |    | Check sound/light equipment and staging before rehearsal    |
|     |    | Hold final rehearsal  |