

Event Planning Checklist

6 to 12 Months Ahead

Yes No

- ___ ___ Decide event purpose (raise funds, visibility, celebration, etc.)
- ___ ___ Choose a theme
- ___ ___ Visit potential sites
- ___ ___ Research/appoint an event coordinator/manager
- ___ ___ Research/select committees/chairpersons
- ___ ___ Chairperson forms subcommittees
- ___ ___ Get cost estimates (site rental, food, drinks, sound/lights, etc.)
- ___ ___ Get recommendations for entertainment; hold auditions
- ___ ___ Get bids for entertainment
- ___ ___ Get bids for decorations
- ___ ___ Get bids for design/printing
- ___ ___ Get bids for other major items
- ___ ___ Finance committee drafts initial budget
- ___ ___ Decide on admission cost
- ___ ___ Create sponsorship amounts/levels
- ___ ___ List items to be underwritten and possible sources
- ___ ___ Research/approach honorees
- ___ ___ Compile mailing list (individuals/businesses)
- ___ ___ Check proposed date for potential conflicts, finalize date in writing
- ___ ___ Get written contracts for site, entertainment, etc.

- ___ ___Develop alternative site (if event is outdoors)
- ___ ___Consider pre-party event for publicity or underwriting
- ___ ___Invite/confirm VIPs
- ___ ___Pick graphic artist; begin invitation design
- ___ ___Create logo for event with graphic artist
- ___ ___Order hold-the-date cards or other event announcements
- ___ ___Set marketing/public relations schedule
- ___ ___Develop press release and calendar listings
- ___ ___Select photographer; arrange for photos of VIPs, chairmen, honorees
- ___ ___Get biographical information on VIPs, celebrities, honorees, chairmen
- ___ ___Investigate need for special permits, licenses, insurance, etc.

3 to 6 Months

- ___ ___Begin monthly committee meetings
- ___ ___Write/send requests for funding or underwriting 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 company
- ___ ___Make list of locations for posters

- ___ ___Finalize mailing lists; begin soliciting corporations and major donors
- ___ ___Obtain lists from honorees, VIPs
- ___ ___Obtain radio/TV sponsors, public service announcements, promos
- ___ ___Set menu with caterer for food and beverages
- ___ ___Secure permits and insurance
- ___ ___Get written confirmation of celebrity participation/special needs
- ___ ___Finalize audio/visual contract
- ___ ___Select/order trophies/awards

2 Months Ahead

- ___ ___Hold underwriting or 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, honorees
- ___ ___Obtain contracts for decorations and rental items
- ___ ___Confirm TV/radio participation
- ___ ___Release press announcements about celebrities, VIPs, honorees
- ___ ___Follow up to confirm sponsorships and underwriting
- ___ ___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, chairpersons and responsible site staff members at event site
- ___ ___ Review/finalize budget, task sheets and tentative timeline
- ___ ___ Start phone follow-up for table sponsors (corporate, VIP, committee)

1 Month Ahead

- ___ ___ Phone follow-up of mailing list (ticket sales)
- ___ ___ Place newspaper ads, follow up with news media, on-air announcements
- ___ ___ Confirm staff for registration, hosting, other
- ___ ___ 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 (include arrival time, flight number, airline, person assigned to meet flight)
- ___ ___ 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 Before

- ___ ___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 event site, hotel, transportation
- ___ ___Deliver final scripts/ timelines to all program participants
- ___ ___Finalize catering guarantee, refreshments
- ___ ___Confirm number of volunteers
- ___ ___Make follow-up calls to news media for advance and event coverage
- ___ ___Distribute additional fliers
- ___ ___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

Day Before Event

- ___ ___ Recheck all equipment and supplies to be brought to the event
- ___ ___ Have petty cash and vendor checks prepared

Event Day

- ___ ___ Arrive early
- ___ ___ 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