

High Level Planning: 4-6 Months Ahead of Event *

- 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

**start your planning as early as possible.*

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

We hope you found this checklist helpful in getting started with event planning. Use this as a starting point to identify or assign activities to various volunteers or staff; or print this off so you can literally check-off items as they are assigned or accomplished.