

Event Planning Checklist

Printable Event Scheduling Checklist

6 to 12 Months Ahead

___ ___ 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

___ ___ 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

___ ___ 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