

EVENT CHECKLIST

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 (if applicable)
- ☐ Create and launch publicity plan & brand your event (ensure volunteers are identified to manage specific tasks – e.g. media relations, printed material design & printing coordination, signage, online /social media, etc.) – if applicable
- ☐ Identify and confirm speakers/presenters/entertainers
- ☐ Identify and contact potential sponsors
- ☐ Ticket prices
- ☐ Set up/enable online registration
- ☐ Sponsor levels/amounts

*start your planning as early as possible

3-4 Months Ahead of Event

- ☐ Speaker/presenter/entertainer liaison
- ☐ Have contracts signed if appropriate, etc.
- ☐ Venue/logistics planning
- ☐ 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
- ☐ 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, programmes, posters, tickets, etc.
- ☐ Develop media list & prepare News Release and all media kit materials (e.g. speaker info, photos, etc.)
- ☐ Create a Facebook event page
- ☐ Register your event on a variety of online event calendars
- ☐ Create some buzz on member forums

2 Months Prior to Event

- ☐ Send reminders to contact list re registration/participation
- ☐ Sponsorship: Follow up to confirm sponsorships
- ☐ Press release about events
- ☐ Create event script (e.g. MC, speaker introductions, thanks, closing, 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 for registration or set-up, etc.) – if applicable
- ☐ Brief any/all hosts, greeters, volunteers about their event duties and timelines
- ☐ Final table plan, place cards, etc.
- ☐ Provide final registration numbers to caterer
- ☐ Make and print copies of any speeches, videos, presentations, etc.
- ☐ Final registration check and 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 (if applicable)
- ☐ Ensure all signage is in place (if applicable)
- ☐ 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 (if applicable)

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

Immediately Following Event

- ☐ Financial status: gather all receipts, documentation, final registration data, etc. and update budget
- ☐ Send thank-you's and acknowledgement letters to (In your thank-you notes, be sure to remind the recipients of the events success – and how they contributed e.g. amount raised, awareness - number of participants, etc.)
- ☐ Post-event publicity
- ☐ Press release
- ☐ Social media
- ☐ Newsletter on event success
- ☐ Conduct a Post-Event Survey – to learn what people enjoyed about your event, and where you have room to improve.
- ☐ Reach out to event participants/attendees – 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

Adapted from <https://www.wildapricot.com/articles/event-checklist>