

Event Planning Checklist

By Nicole Nichols-West

- ☐ 6 to 12 Months before the event
 - ☐ Decide event purpose (raise funds, visibility, celebration)
 - ☐ Choose a theme
 - ☐ Visit potential sites
 - ☐ Appoint an event coordinator/manager
 - ☐ Sselect committees/chairpersons
 - ☐ Get cost estimates
 - ☐ Get offers for entertainment
 - ☐ Get offers for decorations
 - ☐ Get offers from designers
 - ☐ Finalize budget
 - ☐ Create sponsorship amounts
 - ☐ Create mailing list
 - ☐ Decide on time and date
 - ☐ Get written contracts
 - ☐ Think of alternative site
 - ☐ Invite VIPs
 - ☐ Hire graphic designer
 - ☐ Create logo for event
 - ☐ Order hold-the-date cards
 - ☐ Set marketing schedule
 - ☐ Develop press release
 - ☐ Hire photographer
 - ☐ Investigate need for special permits
- ☐ 3 to 6 Months before the event
 - ☐ Send requests for sponsors
 - ☐ Review with graphic designer 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
- ☐ Set menu with caterer
- ☐ Secure permits and insurance
- ☐ Get written confirmation of celebrity participation/special needs
- ☐ Finalize audio/visual contract
- ☐ 2 Months before the event
 - ☐ Assemble/address invitations
 - ☐ Mail invitations
 - ☐ Distribute posters
 - ☐ Obtain contracts for decorations and rental items
 - ☐ 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
 - ☐ Review/finalize budget, task sheets and tentative timeline
 - ☐ Start phone follow-up for table sponsors (corporate, VIP, committee)
- ☐ 1 Month Ahead before the event
 - ☐ 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
- ☐ 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 the event
 - ☐ 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 the 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