

# Event Planner Checklist

By Kimberly French

- Twelve to Eighteen Months Ahead**
  - Meet with stakeholders** Hold a formal meeting with stakeholders to ensure you understand their needs and are prepared to meet them.
  - Book the venue** In larger cities, this may have to be booked even further ahead. Pay the deposit and sign any necessary contracts to ensure the space is reserved.
  - Secure funding** Before setting a budget, ensure funding is in place.
- Six Months Ahead**
  - Price catering** Make a shortlist of vendors who meet the menu and budget guidelines to present to committee members or the head organizer.
  - Book security** If the event requires security, book now and pay a deposit.
  - Key speakers or guests** Book speakers and send save 'the date' notices to key guests.
- Eight to Twelve Weeks Ahead**
  - Designate an event contact** This is the person guests can call or email for information or to RSVP.
  - Marketing** Advertise the event in media, online, or by sending invitations for a private function.
  - Reserve accommodations** Book a block of hotel rooms near the event venue if out of town guests require.
  - Travel** Price train fare and flights and send this information to guests traveling to attend.
  - Sponsors** If prizes or gifts are required, solicit donations from community sponsors.
  - Audiovisual and seating** Determine audiovisual requirements and a seating arrangement to ensure the seating and equipment is available.
- Four Weeks Ahead**
  - Train staff** Hold a training session for staff to reiterate expectations, set standards, and delegate duties leading up to and the day of the event.
  - Licenses** Secure any parking, liquor, or other required licensing.
  - Catering** Confirm the menu and number of attendees with the caterer.
  - Agenda** Finalize and distribute the agenda to all organizers, speakers, and support/technology staff.
- The Week of the Event**
  - Set-up** Supervise set-up and walk through the days events to ensure all systems are in place, equipment is working, and supplies are adequate.
  - Meet with staff** Take staff through the venue and give each a detailed description of their duties.
  - Prepare signage** Set up signage, place cards, menu boards, and any other visuals.

- Speakers** Contact each speaker to confirm and review the agenda.
- Entertainment** Confirm live entertainment needs and ensure all equipment is ready.
- Decorate the venue** Buy additional supplies, if needed.
- The Day of the Event**
  - Arrive early** Delegate tasks for all organizers, volunteers, and staff. Oversee the operation as all equipment, seating, signage, etc., are checked.
  - Designate greeters** Have an adequate number of staff or volunteers welcome guests and orient them in the space.
  - Be available** Carry a cell phone or handset and communicate regularly with staff and volunteer organizers.
- After the Event**
  - Clean up** Return any rented equipment, glassware, or seating.
  - Prepare thank you notes** Thank all volunteers, speakers, sponsors, and organizers for their contribution.
  - Balance the budget** Prepare a final budget and submit to your organization.
  - Summarize the event** Write a report for organization members who may plan similar events in the future.