

EVENT PLANNING CHECKLIST

Whether you are planning a brown bag lunch, a community roundtable or even a health fair, preparation and organization are the keys to success. The size and scope of your event will dictate how many of the activities listed below need to be integrated into your plan.

Planning – Step One

- ☐ Determine the type, size and atmosphere of the event.
- ☐ Set up your record-keeping process and create an event binder.
- ☐ Select location and plan logistics (room set-up, food, audiovisual equipment, accessibility for the physically challenged, etc.).
- ☐ Develop the budget, timeline and event agenda.
- ☐ Recruit and secure sponsors, if necessary.
- ☐ Identify and invite speakers.
- ☐ Determine what materials and services you will need from outside vendors.
- ☐ Do not forget food and beverages; room set-up, including tables and chairs; photographer; signs, banners and decorations; entertainment; and attendee giveaways.

Planning – Step Two

- ☐ Call potential speakers to seek confirmations.
- ☐ Touch base with sponsors to update them on your progress.
- ☐ Choose a caterer or volunteer to organize the menu and food purchases.
- ☐ Determine food or catering selections; provide caterers with a head count by the deadline.
- ☐ Determine a central office space and medical or mobility needs.
- ☐ Determine transportation access.
- ☐ Finalize and print materials.
- ☐ Decide whether you will invite media and compile a list of which outlets to target, complete with contact information.
- ☐ Distribute invitations.
- ☐ Determine audiovisual needs and make arrangements with the event venue.

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Three Weeks Out

- ☐ Contact speakers to discuss their presentations and ask if they need additional information or support, such as a branded PowerPoint template.

Two Weeks Out

- ☐ Make a list of materials to be taken to the location and begin packaging them.
- ☐ Make staff assignments (including registration staff, note taker, audiovisual coordinator, speaker greeter, media liaison) and explain duties to all staff members.
- ☐ Confirm all event details with photographer, including logistics and the types of shots you're looking for. For example, if a government representative is scheduled to attend, you may want to put their photo on your "shot list."

One Week Out

- ☐ Verify details with venue, confirm audiovisual needs and send venue your room or other event space layout along with any special instructions.
- ☐ Conduct a site walk-through.
- ☐ Call reporters to encourage attendance.
- ☐ Finalize and print the agenda and participant list.
- ☐ Touch base with speakers to make sure they have the correct date and location of the event, as well as the time they are expected to speak. Give speakers the name of a contact person who will greet them upon arrival.
- ☐ Assemble materials for distribution to participants; send them to the venue.
- ☐ Print name tags, if applicable.
- ☐ Draft a press release describing the event on the day of the event or the night before.

Day Before the Event

- ☐ Make sure that all materials arrived at the venue.
- ☐ Pack a "supply kit" with any miscellaneous materials you may need (tape, scissors, stapler, pens, pencils, paper, phone numbers of speakers, etc.).

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Day of the Event

- ☐ Arrive early and check that the location is set up correctly and that audiovisual materials requested are available and functioning. Check all microphones, projectors, audio equipment and computer connections.
- ☐ Check the registration area. Make sure name tags and supplies are plentiful.
- ☐ Plan to have staff members at registration approximately an hour before the start of the event.
- ☐ Make sure staff are in correct locations and that all areas are covered for the entire event.
- ☐ Allow time for run-throughs if requested by your speakers or others participating in the event.
- ☐ Make sure that directional signs are appropriately placed.
- ☐ Distribute the press release.

After the Event

- ☐ Conduct a wrap-up meeting with planning committee, including a de-brief on what worked well and what could be improved for future events.
- ☐ Prepare a written summary and evaluation of event.
- ☐ Complete event binders and records.
- ☐ Review invoices and send payment.
- ☐ Contact organizations that attended the event to discuss collaboration for future events and other activities.
- ☐ Send thank you cards and notes of appreciation to committee members, volunteers, presenters, sponsors, staff members and others involved.
- ☐ Send follow up emails to media that attended and offer assistance with gathering more information.