

Event Planning Checklist

6 to 12 Months Ahead

Yes No

- 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



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- ___ ___ 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

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