

# Event Planning Checklist

## 6 to 12 Months Ahead

- Decide event purpose (raise funds, visibility, celebration, etc.)
- Choose a theme and tone of the event
- Visit potential venues and sites
- Research/appoint an event coordinator/manager (this may also be your catering company)
- Research/select committees/chairpersons
- Chairperson forms subcommittees
- Get cost estimates (site rental, food, drinks, sound/lights, hire, etc.)
- Get recommendations for entertainment; hold auditions
- Organise quotes for entertainment
- Obtain quotations for decorations
- Organise bids for design/printing
- Receive quotes for other major items
- Finance committee drafts initial budget
- Decide on admission cost if any
- Create sponsorship amounts/levels
- List items to be insured and possible sources
- Research/approach honourees
- Compile mailing list database (individuals/businesses)
- Check proposed date for potential conflicts
- Get written contracts for site, entertainment, caterer, hire etc.
- Contingency Plan - If outdoors, have a plan B for inclement weather.
- Consider pre-party event for publicity
- Invite/confirm VIPs
- Choose a graphic designer; begin invitation design
- Create logo for event with graphic designer
- Order hold-the-date cards or other event announcements
- Set marketing / public relations schedule
- Develop press release and calendar listings
- Select photographer / videographer; arrange for photos of VIPs, chairmen, honourees
- Get biographical information on VIPs, celebrities, honourees, chairmen
- Investigate need for special permits, licenses, insurance, etc.



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## 3 to 6 Months Ahead

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 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; begin soliciting corporations and major donors

Obtain lists from honorees, VIPs + Get written confirmation of celebrity participation/special needs

Obtain radio/TV sponsors, public service announcements, promos

Set menu with caterer for food and beverages and sign contract to ensure the date is booked

Secure permits and insurance

Finalize audio/visual contract

Select/order trophies/awards



**"Thanks for making the event  
easy and so polished"  
Melissa Stephens | WCG Super**

## 2 Months Ahead

Hold 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

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

**"Our management and staff were very impressed  
with the food and service you provided us"  
Belinda McMahon | Factory Opening**



## 1 Week Ahead

- 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 and 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



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### 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
- 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
- BREATHE!!

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and palate TODAY!  
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