

**Event Planning Checklist**  
**Courtesy of Kohn Communications**

**Name of event:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Person in charge:** \_\_\_\_\_

**Location:** \_\_\_\_\_

**Prior to event:**

\_\_\_ Determine objective and type of event (e.g., in-house seminar, external cocktail party)

\_\_\_ Determine parking and validation policy

\_\_\_ Approve budget: \$\_\_\_\_\_

\_\_\_ Identify follow-up offers to maximize on-going interaction with attendees

\_\_\_ Compile invitation list

\_\_\_ Invite and confirm speakers/honorees/VIPs

\_\_\_ Prepare invitation and save-the-date message

\_\_\_ Send save-the-date message

\_\_\_ Draft program, presentation

\_\_\_ Get speakers' bio info

\_\_\_ Draft introductions

\_\_\_ Complete mailing lists for invitations

\_\_\_ Order invitations if hard-copy mailing

\_\_\_ Secure reservation of facility/room

\_\_\_ Set menu with caterer

\_\_\_ Determine A.V. needs and reserve

\_\_\_ Send invitations

\_\_\_ Finalize transportation/hotel accommodations/restaurant requirements

- \_\_\_ Obtain contracts for rental item requirements
- \_\_\_ Review signage requirements at registration, directional, etc.
- \_\_\_ Hold walk-through of event with responsible committees and site staff at event site
- \_\_\_ Review/finalize budget, task sheets and timeline: \$\_\_\_\_\_
- \_\_\_ Follow up by phone to confirm attendance of invited guests
- \_\_\_ Confirm staff for registration, welcoming
- \_\_\_ Reconfirm speakers and any other program participants
- \_\_\_ Finalize head count
- \_\_\_ Order handouts, welcome packets
- \_\_\_ Prepare room diagram and seating arrangements
- \_\_\_ Provide estimate of number of guests to caterer
- \_\_\_ Meet with vendors, consultants to coordinate event
- \_\_\_ Review/finalize program
- \_\_\_ Finalize seating arrangements, speaker's platform
- \_\_\_ Confirm transportation schedules: airlines, trains, buses, cars, limos
  
- \_\_\_ Confirm hotel accommodations
- \_\_\_ Prepare welcome packets
- \_\_\_ Prepare name tags/place cards
- \_\_\_ Schedule deliveries and pick-up of special equipment, rentals
- \_\_\_ Confirm set-up and tear-down times with event site
- \_\_\_ Provide caterer with any revised numbers
- \_\_\_ Meet with chairpersons, key staff to finalize any of the above
- \_\_\_ Personally call guests to remind
- \_\_\_ Reconfirm arrival and delivery times with vendors

- \_\_\_ Confirm A.V.
- \_\_\_ Reconfirm event site, hotel, transportation
- \_\_\_ Deliver final scripts/ timelines to all program participants
- \_\_\_ Finalize catering
- \_\_\_ Schedule rehearsals
- \_\_\_ Determine amount of petty cash needed for tips and emergencies
- \_\_\_ Write checks for payments due day of event
- \_\_\_ Recheck all equipment and supplies to be taken to event

**Day of event:**

- \_\_\_ Unpack equipment and supplies
- \_\_\_ Review final details with caterer and set-up staff
- \_\_\_ Check with volunteers and staff to ensure all tasks are covered
- \_\_\_ Set up registration area
- \_\_\_ Check sound/light equipment, A.V. and staging
- \_\_\_ Hold final rehearsal/walk-through
- \_\_\_ Other: \_\_\_\_\_
- \_\_\_ Other: \_\_\_\_\_
- \_\_\_ Other: \_\_\_\_\_

**Post event:**

- \_\_\_ Review roster for follow-up
- \_\_\_ Analyze event and note any required changes for future events