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