

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