

Event Planning Checklist



Your Guide to a Successful Event



LET'S HAVE AN EVENT!

ACTION STEPS to take when you first decide to hold a Fundraising Event

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Determine the overall leader who can commit to the entire event and has the necessary skills to manage the process		
Complete <input type="checkbox"/>	Review history of previous event if applicable; talk to past leaders to determine positive as well as negative aspects of the event.		
Complete <input type="checkbox"/>	Determine Committee and sub committee structure and start recruiting		
Complete <input type="checkbox"/>	Begin an Event Binder and prepare similar binders for committee chairs that contain all pertinent event information (timeline, budget, committee contact information, vendor info, etc.)		
Complete <input type="checkbox"/>	Determine what event software will be utilized for registration, on-site transactions		
Complete <input type="checkbox"/>			
Complete <input type="checkbox"/>			
Complete <input type="checkbox"/>			

9 TO 12 MONTHS BEFORE YOUR EVENT

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Check your dates and select the venue. Be sure to check for other large or similar events in your community. Avoid school and religious holidays, major sporting or political events, etc.		
Complete <input type="checkbox"/>	Determine your event's theme		
Complete <input type="checkbox"/>	Set financial and attendance goals		
Complete <input type="checkbox"/>	Create a budget (see our budget planning template under free tools)		
Complete <input type="checkbox"/>	Determine sponsorship levels and benefits		
Complete <input type="checkbox"/>	Interview and Select Caterer if venue doesn't provide this service		
Complete <input type="checkbox"/>	Interview and select talent (band, disc jockey, etc.)		
Complete <input type="checkbox"/>	Interview and select graphic designer to create all event collateral material (invitations, programs, etc. (Consider seeking in-kind service in exchange for sponsorship recognition.)		
Complete <input type="checkbox"/>			
Complete <input type="checkbox"/>			
Complete <input type="checkbox"/>			

5 TO 8 MONTHS BEFORE YOUR EVENT

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Develop invitation list. Be sure to include email addresses if possible for event reminders and promotional emails to build excitement.		
Complete <input type="checkbox"/>	Create and mail Save the Date cards. Also email to promote the event to guests, sponsors and other donors.		
Complete <input type="checkbox"/>	Remember the web! Create a special page and links on your website promoting the event (selling tickets, accepting donations, promoting special items, etc.)		
Complete <input type="checkbox"/>	Develop High Level Event Scenario (including times, room names, beginning and ending of certain auction activities, volunteer schedule, silent auction sections, etc.) to understand the flow of the event. This activity will allow you to also create your program and invitations closer to the event.		
Complete <input type="checkbox"/>	Audio Visual Needs – determine your sound and AV needs including if you will use a PowerPoint presentation, video, etc. during the event.		
Complete <input type="checkbox"/>			
Complete <input type="checkbox"/>			
Complete <input type="checkbox"/>			

2 TO 4 MONTHS BEFORE YOUR EVENT

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Finalize invitation list and mail. Consider an email reminder schedule to invitees as follow-up.		
Complete <input type="checkbox"/>	Determine all “Day Of” registration needs (nametags, ticket fees that haven’t been paid yet, etc.)		
Complete <input type="checkbox"/>	Continue Volunteer Recruitment for event		
Complete <input type="checkbox"/>	Create Day Of Volunteer schedule (with shifts) and responsibilities		
Complete <input type="checkbox"/>	Consider Tasting of Event Menu with Venue (if appropriate)		
Complete <input type="checkbox"/>	Perform Venue Walk Through – meet with catering manager, evaluate timing, flow, special needs of guests		
Complete <input type="checkbox"/>	Promote event – radio, community newspapers, local activities website, TV, church bulletins, etc. (many of these ideas are free to non-profits in exchange for sponsorships for your event. Also work with your “networks” to find connections to enable more promotion of your event.		

3 TO 8 WEEKS BEFORE YOUR EVENT

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Finalize and print event program or other material for tables.		
Complete <input type="checkbox"/>	Begin production of event signage (welcome/directional signs, etc.)		
Complete <input type="checkbox"/>	Revisit event site and create floor plan. Ensure that guests have ample room to move around; get to the bars, that the tables are set appropriately and identify potential problem or choke points.		
Complete <input type="checkbox"/>	Confirm Talent		
Complete <input type="checkbox"/>	Continue to refine script		
Complete <input type="checkbox"/>			
Complete <input type="checkbox"/>			
Complete <input type="checkbox"/>			

2 WEEKS BEFORE YOUR EVENT

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Mail or email confirmation letter to your guests (which includes schedule of events and other event details like parking, etc.) to all confirmed guests. You can also have volunteers make a “call down” as another nice touch to build excitement for the event.		
Complete <input type="checkbox"/>	Finalize and Confirm Event Volunteers		
Complete <input type="checkbox"/>	Finalize production of event signage		
Complete <input type="checkbox"/>	Finish all table assignments		
Complete <input type="checkbox"/>	Assemble event materials and supplies to deliver to event venue. Create an additional “happy box” to bring with you with one of everything: tape, scissors, paperclips, sharpies, etc.		
Complete <input type="checkbox"/>	Confirm Entertainment		
Complete <input type="checkbox"/>	Organize all collateral material (printed programs, displays, etc.) for delivery to venue		
Complete <input type="checkbox"/>			
Complete <input type="checkbox"/>			
Complete <input type="checkbox"/>			

1 WEEK BEFORE YOUR EVENT

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Conduct training for key volunteers – those handling registration, check out, - anything you feel requires extra or special training.		
Complete <input type="checkbox"/>	Submit final count to caterer or venue. Reconfirm all last minute details		
Complete <input type="checkbox"/>	Finalize event scenario with master of ceremonies and key event participants (other speakers, presenters, etc.)		
Complete <input type="checkbox"/>	Compile Guest Packets (print name tags, special welcome gifts, etc.)		
Complete <input type="checkbox"/>			
Complete <input type="checkbox"/>			
Complete <input type="checkbox"/>			

DAY BEFORE AND DAY OF YOUR EVENT

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Deliver all event materials to the venue		
Complete <input type="checkbox"/>	Complete event day set up		
Complete <input type="checkbox"/>	Train volunteers (who weren't previously trained)		
Complete <input type="checkbox"/>	Test all Audio/Visual equipment		
Complete <input type="checkbox"/>	Print all final guest lists, last minute nametags and any other reports necessary for event.		
Complete <input type="checkbox"/>	Stay Calm		
Complete <input type="checkbox"/>	Talk to all Volunteer Leads to ensure everyone is ready to go!		
Complete <input type="checkbox"/>	Have fun and raise lots of money!		
Complete <input type="checkbox"/>			
Complete <input type="checkbox"/>			

AFTER YOUR EVENT

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Reconcile all money transactions. Confirm that all cash, checks and credit cards payments are accounted for.		
Complete <input type="checkbox"/>	Reconcile event expenses and revenues to determine your net results.		
Complete <input type="checkbox"/>	Thank and recognize volunteers – either with hand written letters or a post event gathering. Don't forget – they are your best asset!		
Complete <input type="checkbox"/>	Thank sponsors and other donors.		
Complete <input type="checkbox"/>	Post results of the event (attendance, special occurrence, money raised on your website and newsletter)		
Complete <input type="checkbox"/>	Schedule and hold post event evaluation meeting with committee.		
Complete <input type="checkbox"/>	Update all information in event binder.		
Complete <input type="checkbox"/>	Determine next year's leadership. Pass binder onto new leadership.		
Complete <input type="checkbox"/>	Set a date for next year's event.		
Complete <input type="checkbox"/>	Celebrate your success and remember to have an action plan for those areas that need improvement!		