



SAMPLE 6-MONTH CHECKLIST

Awareness-raising event with speakers and a reception.

6-Months Before:

- Establish planning group
- Hold planning meeting to determine event goals and objectives
- Determine guest list
- Create mailing list
- Choose date
- Select location (visit potential sites, book venue, find alternative site for back-up plan)
- Outline agenda
- Book caterer
- Choose vendors
 - Get cost-estimates from vendors
 - Get written contracts from vendors
- Set budget
- Decide on theme
- Investigate need for special permits
- Develop Press Release
- Set Marketing Schedule
- Hire graphic designer
- Determine potential speakers

3-5 Months Before:

- Design, print and mail invitations
 - Create logo for the event
 - Review designs with graphic designer (hold-the-date cards and promotional materials)
 - Order hold-the date cards
 - Invite VIP's
- Choose menu and decorations
 - Set menu with caterer
- Hire photographer
- Book chosen speaker(s)
 - Make travel arrangements
 - Book any accommodations
 - Get bio information/photo
 - Finalized speech topics
 - Have contracts signed

QC EVENT SCHOOL

North America: 1 800 267 1829 United Kingdom: 0800 066 4734 Australia: 1800 358 931 New Zealand: 0800 451 979

- Contract with entertainers
- Draft a detailed agenda
- Purchase supplies, awards, gifts and incidentals
- Launch promotion and publicity campaign
- Create Facebook event page
- Create Event Page on company website
- Send requests for sponsors
- Secure permits and insurance

2-Months Before

- Assemble and address invitations
- Mail remaining invitations
- Follow-up to confirm sponsorships
- Obtain logos from corporate sponsors for program printing
- Hold walk-through of event with responsible committees
- Review/finalize budget, task sheets and timelines

1-Month Before

- Reconfirm all contracts and reservations
- Finalize menu and serving style
- Give estimates of guests to caterer
- Assign seats for reception
- Continue publicity
- Confirm hotel accommodations and travel arrangements (if necessary)
- Finalize setup details
- Confirm setup and tear down times with venue
- Assign tasks for day of event
- Arrange for any necessary security

2-Weeks Before

- Prepare final attendee list
- Check with venue for last-minute site details
- Schedule exact time of dress rehearsal
- Hold training session with volunteers
- Secure 2-3 volunteers to help with emergencies
- Send email reminders to all invited guests

1-Week Before

- Give final headcount to vendors, caterer and venue
- Prepare name tags, registration packets, and onsite materials
- Make follow-up calls to news media for advance event coverage
- Prepare final payments for suppliers (write checks)
- Establish amount of petty cash for tips/emergencies
- Prepare gifts for guests and/ or speakers
- Make a refreshment/meal schedule for volunteers

Day of Event:

- Arrive early with prepared vendor checks/petty cash
- Meet with volunteers to ensure all tasks assigned
- Supervise set-up
- Check to ensure all equipment & décor has arrived
- Lead briefing session with speakers
- Create reception area for greeting guests (giving programs, nametags, seating arrangements)
- Greet people at entrance to event site
- Usher speakers during event
- Assist media to arrange interviews & take photos
- Supervise set-up of meals

1-5 Days After Event

- Event accounting (gather all receipts, documentation, etc. and update the budget)
- Write thank you notes to sponsors, speakers, volunteers, donors and media
- Conduct a survey to find out what guests enjoyed about the event for future reference
- Complete written evaluation of event (include suggestions for future events)

Be sure to download this document for future use or share this link with your friends and colleagues who may also find this checklist useful!