

Corporate or Community Event Planning Checklist

6 to 12 Months Ahead

- _____ Decide event purpose and theme (raise funds, visibility, celebration, etc.)
- _____ Visit potential sites
- _____ Appoint an event coordinator
- _____ Research/select vendor(s) for tent (if needed) and other rental equipment
- _____ Get recommendations for entertainment
- _____ Get bids for entertainment, decorations, printing work and other needed items
- _____ Create a draft budget
- _____ Decide on admission cost (if any)
- _____ Create sponsorship amounts/levels
- _____ List items to be underwritten and possible sources
- _____ Research/approach honorees
- _____ Compile mailing list (individuals/businesses)
- _____ Check proposed date for potential conflicts, finalize date in writing
- _____ Get written contracts for site, entertainment, etc.
- _____ Develop alternative site (if event is outdoors)
- _____ Invite/confirm VIPs
- _____ Order hold-the-date cards or other event announcements
- _____ Select photographer; arrange for photos of VIPs, chairmen, honorees
- _____ Get biographical information on VIPs, celebrities, honorees, chairmen
- _____ Investigate need for special permits, licenses, insurance, etc.

3 to 6 Months Ahead

- _____ Write/send requests for funding or underwriting to major donors or sponsors
- _____ Request logos from corporate sponsors for printing

- _____ Complete mailing lists for invitations
- _____ Order invitations, posters, tickets, etc.
- _____ Sign contract with entertainment company
- _____ Sign contract(s) with vendor(s) for tent (if needed) and other rental equipment
- _____ Finalize mailing lists; begin soliciting corporations and major donors
- _____ Set menu with caterer for food and beverages
- _____ Secure permits and insurance
- _____ Get written confirmation of celebrity participation/special needs
- _____ Finalize audio/visual contract
- _____ Select/order trophies/awards

2 Months Ahead

- _____ Assemble/address invitations (with personal notes when possible)
- _____ Mail invitations
- _____ Distribute posters
- _____ Finalize transportation/hotel accommodations for staff, VIPs, honorees
- _____ Work with rental vendors on details for decorations and other rental items
- _____ Release press announcements about celebrities, VIPs, honorees
- _____ Follow up to confirm sponsorships and underwriting
- _____ Review/finalize budget, task sheets and tentative timeline
- _____ Start phone follow-up for table sponsors (corporate, VIP, committee)

1 Month Ahead

- _____ Phone follow-up of mailing list (ticket sales)
- _____ Place newspaper ads, follow up with news media, on-air announcements
- _____ Confirm staff for registration, hosting, other
- _____ Write to VIPs, celebrities, program participants, confirm participation
- _____ Complete list of contents for VIP welcome packets
- _____ Get enlarged site plan/room diagram, assign seats/tables
- _____ Give estimate of guests expected to caterer/food service
- _____ Meet with all outside vendors, consultants to coordinate event
- _____ Review script/timeline
- _____ Continue phone follow-ups for ticket/table sales
- _____ Continue assigning seats; set head table, speaker's platform

- _____ Confirm transportation schedules: airlines, trains, buses, cars, limos
- _____ Confirm hotel accommodations
- _____ Confirm special security needed for VIPs, event
- _____ Prepare welcome packet for VIPs, chairmen, and key staff
- _____ Schedule deliveries of special equipment, rentals
- _____ Confirm setup and tear down times with event site and vendors

1 Week Ahead

- _____ Finish phone follow-ups
- _____ Confirm number attending
- _____ Finish seating/table arrangements
- _____ Secure two or three volunteers to assist with emergencies
- _____ Finalize registration & other site staff
- _____ Distribute seating chart, assignments to hosts/hostesses
- _____ Schedule pickup or delivery of any rented or loaned equipment
- _____ Deliver final scripts/ timelines to all program participants
- _____ Finalize catering guarantee, refreshments
- _____ Final walk-through with all personnel & conduct rehearsal if necessary
- _____ Schedule volunteer assignments for day of event
- _____ Establish petty cash fund for tips and emergencies

Day Before Event

- _____ Recheck all equipment and supplies to be brought to the event
- _____ Have petty cash and vendor checks prepared

Event Day

- _____ Arrive early
- _____ Unpack equipment/supplies and make sure nothing is missing
- _____ Be sure all VIPs are in place and have what they need
- _____ Reconfirm refreshments/meal schedule for volunteers
- _____ Go over all the final details with caterer and setup staff
- _____ Check with volunteers to make sure all tasks are covered
- _____ Setup registration area
- _____ Check sound/light equipment and staging before rehearsal
- _____ Hold final rehearsal