

A large, light pink awareness ribbon is draped across the right side of the page, partially overlapping the title text.

# **The Ultimate** *Event Planning* **Checklist**



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## High Level Planning: 4-6 Months Ahead of Event

- Establish event goals and objectives
- Select a date
- Identify venue and negotiate details
- Develop an Event Master Plan
- Get cost estimates (e.g., room rental, food & beverages, equipment, speaker fees, travel, etc.) and create a budget
- Recruit event committee, event manager or chair and establish sub-committee chairs
- Create and launch publicity plan and Brand your event (ensure staff and/or volunteers are identified to manage specific tasks – e.g., media relations, VIP coordination, printed material design & printing coordination, signage, online/social media, etc.)
- Identify and confirm speakers/presenters/entertainers
- Identify and contact sponsors/partners

**Start your planning as early as possible**

## 3-4 Months Ahead of Event

- Speaker/presenter/entertainer liaison: e.g.:
  - Finalize presentation/speech topics
  - Get bio information, photo
  - Travel & accommodation arrangements
  - Have contracts signed if appropriate, etc.
- Financial/Administration: for example, determine:
  - Registration fees
  - Set up/enable online registration
  - Sponsor levels/amounts
  - Identify items to be underwritten and accounting tracking details

### **3-4 Months Ahead of Event** *continued*

- Venue/logistics planning, e.g.:
  - Investigate need for any special permits, licenses, insurance, etc.
  - Determine and arrange all details re menu, Audio/Video equipment, registration set-up, parking, signage, etc.
  - Review security needs/plan for the event with venue manager
- Publicity: Follow publicity plan, e.g.:
  - Develop draft program
  - Create draft event script (e.g., emcee, speaker introductions, thanks, closing, etc.)
  - Develop publicity pieces – e.g. newsletter articles and/or ads, radio spots, print blog posts articles for submission to other publications and/or ads, etc.
  - Request logos from corporate sponsors for online and printed materials
  - Develop and produce invitations, programs, posters, tickets, etc.
  - Develop media list & prepare News Release, Media Advisory, Backgrounder and all media kit materials (e.g., speaker info. Photos, etc.)
  - Create event page on your website
  - Enable/create email event notifications
  - Create a Facebook event page
  - Develop a promo video and post on YouTube and your Facebook page
  - Register your event on a variety of online platforms & event calendars
  - Create some buzz on your blog or member forums
  - Determine VIP's and create invitation & tracking documents (e.g., spreadsheet)

## **2 Months Ahead of Event**

- Send reminders to contact list re registration/participation
- Presenters/Speakers, e.g.:
  - Confirm travel/accommodation details
  - Requests copy of speeches and/or presentations
- Sponsorship: Follow up to confirm sponsorships and underwriting
- Publicity:
  - Release press announcements about keynote speakers, celebrities, VIP's attending, honorees, etc.
  - Post your initial event news release on your website and circulate to all partners, affiliated organizations, etc.

## **1 Week Ahead of Event**

- Have all committee chairs meet and confirm all details against the Master Plan – and ensure back-up plans are developed for any situation (e.g., back-up volunteers as VIP greeters, additional volunteers for registration or set-up, etc.)
- Finalize event script
- Brief any/all hosts, greeters, volunteers about their event duties and timelines
- Final seating plan, place cards, etc.
- Provide final registration numbers to caterer
- Make print and online copies of any speeches, videos, presentations, etc.
- Final registration check, name badges & registration list
- Determine photo op and interview opportunities with any presenters, VIP's etc., and confirm details with interviewee and media

## **1 Day ahead of Event**

- Confirm media attending
- Ensure all signage is in place
- Ensure registration and media tables are prepared and stocked with necessary items (e.g., blank name badges, paper, pens, tape, stapler, etc.)
- Ensure all promo items, gifts, plaques, trophies, etc. are on site

## **Event Day**

- Ensure you have copies of all instructions, directions, phone numbers, keys, extra parking permits for VIP guests, seating charts and guest lists with you
- Check-in with each Committee Chair to ensure their team is on track

## Immediately following the Event

While you need to conduct a thorough evaluation and update your budget, there are post-event publicity, fundraising and member development opportunities that you can take advantage of.

Here are some activities you might consider once the event is over:

- Financial status: gather all receipts, documentation, final registration data, etc. and update your budget
- Send thank-you's and acknowledgement letters to:
  - Sponsors
  - Volunteers
  - Speakers/Presenters
  - Donors
  - Media
- In your thank-you notes, be sure to remind the recipients of the event's success – and how they contributed (e.g., dollars raised, awareness – number of participants, etc.
- Post-Event publicity:
  - Conduct a Post-Event Survey – to learn what people enjoyed about your event, and where you have room to improve
  - Follow-up communication with Event Participants
  - Reach out to all event participants – thank them for participating and promote your ongoing programs and how they can support you throughout the year by joining, volunteering or making a sustaining donation
  - Conduct a thorough evaluation