

#1 Resource for planning a Corporate Event The....

Event Scheduling Checklist

[Courtesy of Event-plannerwest.com](http://www.event-plannerwest.com)

6 to 12 Months Ahead

Yes No

___ ___ Decide event purpose (raise funds, visibility, celebration, etc.)

___ ___ Choose a theme

___ ___ Visit potential sites

___ ___ Research/appoint an [event coordinator/manager](#)

___ ___ Research/select committees/chairpersons

___ ___ Chairperson forms subcommittees

___ ___ Get cost estimates (site rental, [food, drinks](#), sound/lights, etc.)

___ ___ Get recommendations for entertainment; hold auditions

___ ___ Get bids for entertainment

___ ___ Get bids for decorations

___ ___ Get bids for design/printing

___ ___ Get bids for other major items

___ ___ Finance committee drafts initial budget

___ ___ Decide on admission cost

___ ___ 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, [catering](#), entertainment, etc.
- Develop alternative site (if event is outdoors)
- Consider pre-party event for publicity or underwriting
- Invite/confirm VIPs
- Pick graphic artist; begin invitation design
- Create logo for event with graphic artist
- Order hold-the-date cards or other event announcements
- Set marketing/public relations schedule
- Develop press release and calendar listings
- 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

- Begin monthly committee meetings
- Write/send requests for funding or underwriting to major donors, corporations, sponsors
- Request logos from corporate sponsors for printing
- Review with graphic artist invitations, programs, posters, etc.
- Prepare final copy for invitations, return card, posters
- Prepare final copy for tickets
- Complete mailing lists for invitations
- Order invitations, posters, tickets, etc.
- Sign contract with entertainment company
- Make list of locations for posters
- Finalize mailing lists; begin soliciting corporations and major donors

- ___ ___ Obtain lists from honorees, VIPs
- ___ ___ Obtain radio/TV sponsors, public service announcements, promos
- ___ ___ 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

- ___ ___ Hold underwriting or preview party to coincide with mailing of invitations; invite media
- ___ ___ Assemble/address invitations (with personal notes when possible)
- ___ ___ Mail invitations
- ___ ___ Distribute posters
- ___ ___ Finalize transportation/hotel accommodations for staff, VIPs, honorees
- ___ ___ Obtain contracts for decorations and rental items
- ___ ___ Confirm TV/radio participation
- ___ ___ Release press announcements about celebrities, VIPs, honorees
- ___ ___ Follow up to confirm sponsorships and underwriting
- ___ ___ Obtain logos from corporate sponsors for program printing
- ___ ___ Review needs for signs at registration, directional, etc.
- ___ ___ All major chairpersons to finalize plans
- ___ ___ Hold walk-through of event with responsible committees, chairpersons and responsible site staff members at event site
- ___ ___ 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
- ___ ___ Prepare transportation and accommodations (include arrival time, flight number, airline, person assigned
___ ___ to meet flight)
- ___ ___ 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
- ___ ___ Finalize plans with party decorator
- ___ ___ Give caterer revised numbers
- ___ ___ Meet with chairpersons, key staff to finalize any of the above

1 Week Before

- ___ ___ Meet with all committees for last-minute details

- Finish phone follow-ups
- Confirm number attending
- Finish seating/table arrangements
- Hold training session with volunteers; finalize assignments
- Secure two or three volunteers to assist with emergencies
- Finalize registration staff
- Distribute seating chart, assignments to hosts/hostesses
- Schedule pickup or delivery of any rented or loaned equipment
- Double-check arrival time and delivery times with vendors
- Reconfirm event site, hotel, transportation
- Deliver final scripts/ timelines to all program participants
- Finalize catering guarantee, refreshments
- Confirm number of volunteers
- Make follow-up calls to news media for advance and event coverage
- Distribute additional fliers
- Final walk-through with all personnel
- Schedule rehearsals
- Schedule volunteer assignments for day of event
- Establish amount of petty cash needed for tips and emergencies
- Write checks for payments to be made for the day of the event

Day Before Event

- Lay out all clothes that you will need the day of the event
- Recheck all equipment and supplies to be brought to the event
- Have petty cash and vendor checks prepared

Event Day

- Arrive early (with your change of clothes)
- Unpack equipment, supplies and make sure nothing is missing
- Be sure all VIPs are in place and have scripts
- 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

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