***Event Checklist***

This is designed to be a starting point but is general so you may need to consider other event specific things or there may be things that are not applicable to you.

1. Establish your event goals and objectives.
2. Select your event’s date.
3. Develop an event master plan.
4. Create an event budget.
5. Brand your event and begin publicity.
6. Arrange sponsorships and speakers for your event.
7. Co-ordinate with event suppliers (catering, equipment, etc).
8. Manage event day set up and execution.
9. Conduct a thorough evaluation of your event.

**4-6 months prior to event (yes, you should think that far ahead!)**

The further in advance you can start planning, the better. Here’s what you need to do:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| TICK | TASK | SUB TASK | OWNER | PARTNER |
|  | Establish your event goals and objectives. Are you raising money, awareness, saying thank you? How many attendees are you hoping to get? Who do you want to attend? Establishing it upfront will make it easier to gauge the success of your event. |  |  |  |
|  | Select the date. Make sure it doesn’t conflict with any other major events taking place in the diocese, or any major holidays. |  |  |  |
|  | Identify venue and negotiate details. Determine the requirements before committing. |  |  |  |
|  | Develop an event master plan. Ironing out every detail will help ensure you don’t miss a thing – people, food, first aid etc. |  |  |  |
|  | Get cost estimates. Some costs you might need to consider are: |  |  |  |
|  |  | Room rental |  |  |
|  |  | Food & beverages |  |  |
|  |  | Equipment |  |  |
|  |  | Speaker fees |  |  |
|  |  | Travel for staff (likely budgeted in your departmental budget but good to have an understanding in terms of individual events) |  |  |
|  |  | Insurance (always check) |  |  |
|  |  | Risk Assessment (conduct your own & ask venues for theirs) |  |  |
|  | Create an event budget. Based on the costs above, you’ll be able to determine how much your event will cost — and if you’ll need to reduce any of them! |  |  |  |
|  | Recruit help. |  |  |  |
|  | Brand your event. |  |  |  |
|  |  | Start planning what you might need for your event on the diocesan website – Save the date/ Web banner. |  |  |
|  |  | Develop the event title/ tagline. |  |  |
|  | Create a publicity plan. The plan includes identifying what resources you require from printed material design & printing, signage, online /social media, photography etc. |  |  |  |
|  | Identify and confirm speakers/presenters/entertainers. Who will you need on hand during the event? The Bishops’ diaries get full quickly so you need to plan and act with a lot of notice. |  |  |  |
|  | Identify and contact sponsors/partners. |  |  |  |
|  | Determine if you need people to register for the event. |  |  |  |
|  |  | Ensure registration forms are accessible and allow space for preferred pronouns and preferred names if applicable. |  |  |

**3-4 months prior to event**

Now that you have some of the foundational parts of your event figured out, it’s time to start executing on the rest. If your event is coming up in a few months, you’ll need to start communicating with all the stakeholders outside your organization and continue co-ordinating with them. Some points you’ll need to remember include:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| TICK | TASK | SUB TASK | OWNER | PARTNER |
|  | Speaker/presenter/entertainer liaison: |  |  |  |
|  |  | Finalize presentation/ speech topics |  |  |
|  |  | Get bio information, photo |  |  |
|  |  | Travel & accommodation arrangements |  |  |
|  |  | Ask speakers to start promoting and sharing it with their network |  |  |
|  | Financial/Administration: |  |  |  |
|  |  | Decide if there will be a cost to attendees. |  |  |
|  |  | Set up and enable online registration (You should have already arranged this with the Ops team and agreed the open date) |  |  |
|  | Venue and logistics planning: | Determine and arrange all details re menu, A/V equipment, registration set-up, parking, signage, etc. |  |  |
|  |  | Review security needs/plan for the event with venue manager |  |  |
|  |  | Investigate need for any special permits, licenses, insurance, etc. |  |  |
|  |  | Assess accessibility requirements (e.g. all-gender restrooms, wheelchair accessibility, etc). |  |  |
|  |  | Communicate accessibility requirements. |  |  |
|  | Follow publicity plan: |  |  |  |
|  |  | Develop draft program/ service |  |  |
|  |  | Create draft event script (e.g., MC, 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 |  |  |
|  |  | Develop a promo video and post on YouTube and your Facebook page (if applicable & if budget) |  |  |
|  |  | Register your event on a variety of online event calendars |  |  |
|  |  | Create some buzz on your blog or member forums if applicable |  |  |
|  |  | Determine VIPs and create invitation & tracking document (e.g., spreadsheet) |  |  |
|  |  | Order any desired event swag |  |  |

**1-2 months prior to event**

You’re getting there! At this point, you’re probably spending more and more time focusing on the event and finalizing some details.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| TICK | TASK | SUB TASK | OWNER | PARTNER |
|  | Send reminders to your contact list regarding registration and participation. |  |  |  |
|  | Reach out again to presenters/speakers regarding: |  |  |  |
|  |  | Confirming travel and accommodation details |  |  |
|  |  | Request copy of speeches and/or presentations |  |  |
|  | Sponsorship finalisation: |  |  |  |
|  |  | Follow up to confirm sponsorships and underwriting |  |  |
|  |  | Get any promotional materials you'll be sharing at the event |  |  |
|  |  | Ask sponsors to share event on their promotional channels |  |  |
|  | Continue executing on your publicity plan: |  |  |  |
|  |  | Release press announcements about keynote speakers, celebrities, VIPs attending, honourees, etc. |  |  |
|  |  | Post your initial event news release on your website and circulate to all partners, affiliated organisations, etc. |  |  |
|  |  | Post more details about your event on social media |  |  |
|  | Finalise and proofread printed materials |  |  |  |

**1 week prior to event**

You’re getting so close! By this point, the majority of the event details should be confirmed and all that’s left will be final touches, such as:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| TICK | TASK | SUB TASK | OWNER | PARTNER |
|  | Get your team together. You should also ensure back-up plans are developed for any situation (e.g., back-up volunteers as VIP greeters, additional volunteers for set-up, etc). |  |  |  |
|  | Finalise event script: |  |  |  |
|  |  | Assign practice sessions for anyone who has a speaking slot if applicable. |  |  |
|  | Brief any/all hosts, greeters, volunteers about their event duties and timelines. |  |  |  |
|  | Finalize your seating plan. |  |  |  |
|  |  | Ensure it includes wheelchair-accessible areas and has clear paths through the venue. |  |  |
|  | Provide final registration numbers to caterer. |  |  |  |
|  | Make print and online copies of any speeches, videos, and presentations. |  |  |  |
|  | Do a final registration check, including name badges & registration list. Depending on when your registration closes, this may not be possible until a few days in advance, but try to finish it as early as possible. |  |  |  |
|  | Determine photo op and interview opportunities with any presenters and VIPs. |  |  |  |
|  | Confirm details with media attendees. |  |  |  |
|  |  |  |  |  |

**1 day prior to event**

Here are a few last-minute details you might want to remember:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| TICK | TASK | SUB TASK | OWNER | PARTNER |
|  | Confirm media attendance. |  |  |  |
|  | Ensure all signage is in place — both around the venue and any other areas in which it’s needed. |  |  |  |
|  | Ensure all promo items, gifts, plaques, trophies, etc. are on-site. |  |  |  |
|  | Ensure all A/V equipment is set up and working properly. |  |  |  |

**Event day**

The big day has arrived! Here’s what you have to remember:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| TICK | TASK | SUB TASK | OWNER | PARTNER |
|  | 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 your team, volunteers and catering and any sponsor teams that are attending. |  |  |  |
|  | Assist sponsors, speakers, and other teams as needed. |  |  |  |
|  | Greet new attendees. |  |  |  |

**Immediately following event**

Now that the event is over, 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 with just a little pre-event planning.

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| TICK | TASK | SUB TASK | OWNER | PARTNER |
|  | Check in with venue. Ensure nothing important was left behind. |  |  |  |
|  | Financial status: |  |  |  |
|  |  | Gather all receipts and documentation, final registration data, etc. and |  |  |
|  |  | Update budget |  |  |
|  | Send thank-yous and acknowledgement letters to (*In your thank-you notes, be sure to remind the recipients of the event’s success – and how they contributed (e.g., money raised, awareness - number of participants, etc.)*: |  |  |  |
|  |  | Sponsors, volunteers, speakers/ presenters, donors, the media |  |  |
|  | Post-event publicity: |  |  |  |
|  |  | Send out an email to your subscriber base with highlights from the event |  |  |
|  |  | If budget & pre-planned, provide material to make a publicity reel video to share how it went (and as a bonus, you can use it as publicity next year!) |  |  |
|  |  | Provide highlights for sharing on social media |  |  |
|  |  | Provide update for website page to reflect that it’s a past event. |  |  |
|  |  | Provide information for a post event press release (this must be within 48 hours of event). |  |  |
|  | Conduct a post-event survey. Learn what people enjoyed about your event and where you have room to improve. |  |  |  |
|  | Reach out to 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 team debrief to learn their thoughts.  Conduct a thorough evaluation of the event. What went well and what could you do better next time? |  |  |  |