

Event Planning Timeline

1+ year before:

- Set tentative date
- Work out preliminary budget
- Look for venue
- Look for caterer (if bringing in outside catering to venue)
- Look at what other events are occurring around the same time to avoid conflict of interest

9 – 12 months before:

- Create any committees necessary
- Confirm budget
- Assess volunteer/staffing requirements
- Finalize and secure venue and caterer with deposit
- Revise sponsorship package and send out
- Book any big-name/headliner entertainment

4 – 6 months before:

- Ask for rental quotes
 - Confirm and book all required rentals
- Finalize art work
 - Order all promotional print materials for marketing and advertising
- Finalize marketing and advertising plan
- Confirm entertainment, speakers, MC
 - Book travel, if required
 - Reserve accommodations, if required
- Set up online sales/online RSVP
- Assess any special needs or requirements guests may have
- Order any take-away and/or promotional items required
- Revise invitations and send out

6 – 9 months before:

- Start revisions on art work
- Assess needs for rentals
 - AV
 - Linens
 - Dishes
 - Etc.
- Identify the guest list (if applicable)
- Identify your hosts and contact them
 - Enter into conversation with them about their responsibilities as a host
- Create preliminary plans for marketing and advertising
- Start looking for entertainment and speakers
- Revise donation request letters and send out

2 – 4 months before:

- Open registration/start gathering RSVPs
- Develop event program/timeline for how the event will run
- Anticipate any possible venue issues (parking, lighting, signage, seating, etc.)
- Follow up with venue, caterer, and rentals to ensure accounts are up to date and all on schedule
- Create volunteer/staffing assignments

6 weeks before:

- Confirm room set up and all supplies necessary
- Order print materials for event (eg., signage)
- Monitor registration and RSVPs
- Send out request for volunteers/staffing
- Receive all promised monies/donations
 - Item donation
 - Sponsorships

2 – 4 weeks before:

- Receive any materials/items ordered
- Send guaranteed numbers to venue and caterer
- Confirm set up and delivery times with venue, caterer, and rentals
- Identify volunteers and staff and provide additional details about roles and expectations
- Reach out to hosts and guests, re: attendance and RSVPs
- Make preparations for in-house printing (eg., name tags)
- Check in with entertainment, speakers, MC for any changes or requirements
 - Offer assistance with scripts or event details
- Prepare write-ups for individuals involved in event and/or packages for event program
- Package all items together
 - Prepare bid sheets

Day before:

- Check in with venue staff for set-up
 - Ensure seating and/or tables are set as desired
 - Set up registration area
- Perform full AV checks with presentation materials
 - Invite speakers to attend full run-through
- Ensure all payments are prepared (if not on account or to be paid post-event)

Day of:

- Arrive at least 1 hour before event start
 - Check all function spaces
 - Oversee any last minute set up (eg., setting signage)
- Check in with all volunteers/staff
 - Delegate any tasks that remain
 - Ensure familiarity with event timeline
- Act as a host and be available for venue and catering staff, volunteers/staff, and attendees
 - Be patient if they offer advice or criticism
 - Sincerely thank for compliments

1 week before:

- Close registration and give venue and caterer final numbers
- Finalize timeline and print hard copies of timeline and volunteer job descriptions
- Have all items and rentals delivered to venue at least 24 hours in advance
 - Check all items and materials to ensure they are as they should be
 - Make arrangements for items to come back to office
 - Confirm pick-up details for rentals
- Print all in-house items
 - Programs
 - Name tags
 - Bid sheets
 - Signage
- Revise and test any AV presentations in-office
- Touch base with all volunteers, staff, speakers, entertainment, and MC to ensure they have all tools and/or items they need
- Compile a list of all vendors/ event staff with contact names and numbers, in case of emergency

Week following:

- Complete post-event evaluation and debrief all volunteers/staff involved
 - Identify strengths and weaknesses
 - Identify any problem areas and make suggestions for remedy
 - Consider circulating a survey for attendee feedback
- Send out thank you letters where possible/applicable
- Touch base with venue and caterer to review all charges and prepare final payments for account in full
- Book tentative dates for next year (if staying at same venue)