

Planning Tips and Checklist

When planning for your next event, consider gathering some essential details that may help to make your event a success.

Event Objectives

- What is the purpose of the event?
- What type of event would you like to hold?
- Does the event achieve your or your organization's goal?
- What type of learning or education purpose does the event serve?

Plan a Budget

Consider some of these costs that your event may need.

- Rental of venue and equipment
- Catering
- Décor
- Promotional materials
- Photography and videography
- Entertainment
- Transportation and parking
- Accommodations
- Security
- Custodial fees

Date & Location

When considering the timing of your event, plan for your event as far in advance as possible.

- Select a preferred date, but also be sure to consider an alternate date.
- Check the date availability with the venue prior to scheduling any presenters.
- Select a time that will work best for your participants and intended audience.
- What kind of space will serve your event best?
- What equipment do you need?
 - Tables
 - Chairs
 - Lectern
 - Risers
 - Audio/Visual
 - Markerboards
- If your event is outdoors, do you have a contingency plan in case of inclement weather?

Catering

How do you plan on serving food?

Will you be serving alcohol?

Do any of your important participants have special dietary requirements?

Does the venue have a preferred caterer list?

Event Logistics

- Create an event agenda. An agenda can include
 - A breakdown of the event by time
 - Speakers/presenters with their topics
 - Breakout rooms
- Will guests need to register or check in? How will your event conduct check-ins?
- Do you plan on charging admission? How will you be collecting funds?
- Do you have a main speaker or MC?
- Will you need to write a run-of-show or script to thread your whole event together?
- Does your event include “photo opportunities” for important moments?
- Does your event have any minors?
- Does your event need directional or informational signage?
- Do any of your guests have special accessibility requirements?
- Do your guests need name badges or tent cards?

Audio/Visual

- What AV equipment do you need?
 - Projectors
 - Screens
 - Microphones
 - PA Systems
 - Lighting
 - Videography services
- Do you require professional AV staffing?

Marketing

- What is your event’s primary message that you will want to communicate to your intended audience?
- How do you plan to communicate and promote your event?
 - invitations
 - flyers
 - social media
 - email

- website
- in-person
- digital signage
- posters
- Does your event need programs or informational packets?

Transportation & Parking

- Will your guests need transportation to the event?
- Will you need to inform your guests of parking permit fees?
- Do you need to staff the event with parking attendants?
- Are any of your guests flying in? Do they have transportation arranged to get from the airport to the venue?