

EVENT PLANNING TEMPLATE



Created by

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Welcome!

Hi! I'm Sally Mildren, CEO of Boss Lady Consulting. For more than 20 years I was a boots-on-the-ground marketing and outreach leader responsible for events and campaigns. That's where this event checklist came from...experience!

This checklist has been used to plan conference exhibits, staff events, anniversary celebrations, fundraisers, community outreach activities, brand relaunches, formal events, and even planning my niece's wedding reception.

Some say I'm a little over the top on planning, but I can tell you, this form and the accompanying Excel framework saved my back end on more than one occasion. The worksheet walks you through the things you need to consider to get a clear strategy for your event and the spreadsheet helps you manage all the pieces. Sending all our best vibes for a very successful event. Reach out if we can help you in any way.

Sally



THE BASICS - EVENT FOUNDATIONS

The first stage is identifying the basic details of the event. This sounds obvious, but sometimes gets skipped and you jump off into tactics without the essential details.

What is the purpose of the event?

Think about your primary goals as an organization for the year...which one(s) does this event support?

Who is the event intended to reach? Who is the primary audience?

What is your budget for this event? Don't proceed with planning until you know!

How many people are included or planned for at this event?

On what date and at what time will the event be held?

What support or resources do you have to implement this event? Will it be on top of your existing work? Do you have other staff or volunteers to help? Estimate how much time you think it will take to organize and implement this event.



THE DETAILS - VENUE + SET UP

What venue will your event take place at? Do you need to get a contract or agreement in place? If you do, be sure to know exactly what is included or not included in the contract.

Do you have a back up or alternate location that can accommodate the event in case of conflicts or last minute changes? (optional)

What infrastructure will you need to make the event happen? Highlight those items you will need for this event. Circles the ones that are provided at the venue for you.

- Tables (type - dining, serving, registration, gift, etc.) # needed:
- Podium (type - single, presentation, room for computer, skirt, open, etc.)
- Stage (size? height? stairs? skirt?)
- Dividers/Drapes (for backdrop, dividers, etc.)
- Screen (for presenting or videos)
- Chairs (type - dining, seating area, panel members, leaders, etc.)
- Microphone (type - lapel, wireless, handheld, mic stands, how many?)
- Video projection (need sound too or just images)
- Computer access (for presentations or slide shows) - do you have the right connectors?
- Amplification (music? videos? microphones?)
- Music/DJ (music needed before hand? from a playlist or downloaded? live music? set up? If using a DJ - you need a table, connections, power)
- Lighting (spot lights, focus lights, etc.)
- Florals/Centerpieces (tables, registration, etc.)



THE DETAILS -VENUE + SET UP (CONT.)

- Decor (arches? posters? balloons allowed? what type? banners? signage?)
- Dance floor (size? material? color? location?)
- Coat check (location? coat tags?)
- Wifi/Internet (available at location? wifi? LAN?)
- Tents (size? color? material? sides or no sides? how many? where allowed?)
- Tablecloths/napkins (size? color? material? how many? where leave?)
- Dishes/Glassware/Utensils? (size? color? how many? where leave when done?)
- Serving ware (serving dishes, buffet line, heating, serving utensils, tables, skirts for tables, what color, do they provide service/catering staff, etc.)
- Coffeemaker or Hot Water (hot water for tea/cocoa, coffee service, cups, saucers, sugar, cream, spoons to stir, etc.)
- Ropes/Stanchions (for directing crowds)
- Electrical Outlets (how many, how far away, what amps/wattage allowed, power strips included, extension cords included, rules regarding cord covers/tape)
- Ladders or other resources/tools available for moving heavy boxes, setting up, hanging decor, etc. (note, some venues require use of contract staff due to union rules and employment contracts).

What is set-up and tear down window for the venue? Get an exact schedule so you know how to get helpers there in time. Check if you can ship items to the venue and what window those will be received within (and if there's extra cost).

Is food allowed at the venue? If so, what are the restrictions/rules? i.e. is in-house catering required? Can you bring outside food/beverage in? Even at a medical facility you work in, there may be rules on bringing in outside food.



THE DETAILS -VENUE + SET UP (CONT.)

If ordering F & B from the venue, what are menu options? Is there extra charge for water at tables? Will it be buffet service or plated service? Do they provide servers? Get menu and exact details of service schedule.

How does F & B plan make accommodations for allergies, food sensitivities, or other cultural considerations for menu?

What is the cut-off date to make changes to the menu and/or count for F & B? Is part of the bill due up front – get the exact billing timelines for your A/P colleagues.

If you are using Food Trucks or other individual catering entities, verify food handlers permits and licensing as required. Your Accounting Division will likely require a W-9 and business information to be able to set them up in the vendor system to pay them. Get the payment schedule (usually half up front, half day of event) and communicate with A/P on those details.

Will transportation or parking considerations need to be made for the chosen venue? If so, ensure that you do not need a permit or other considerations from the city or neighborhood (if applies) for extra traffic/parking for the event.



THE DETAILS -VENUE + SET UP (CONT.)

Will you have amplification, music or other loud speaker type of content for the event?

If your venue is outdoors, do you need a permit or noise permit to play music and amplify voices or other?

Some outdoor venues, even when rented, require a fire inspection prior to the event if the "general public" is invited. Be sure to check the regulations, permit and inspection requirements for your local area.

If required obtain necessary permits for event location, inspections, etc.,

Does venue or location require security presence (often yes if alcohol is being served). If so, do they have staff you can hire or are outside services required?

Are there adequate restroom services available at the venue to support the crowd size? Will additional portable facilities be required? Who will manage the restrooms (keep facility stocked and clean?)

Are there rules about decor? Can you hang stuff on the walls? Must use command hooks or non-stick tape? Tacks ok? Locations that must remain clear? Etc. If you are planning to use balloons, make sure there are no limitations on type (i.e. no latex) or that they are allowed. Some venues do not allow them because they get loose and hang on the ceiling where they can trouble fire systems, etc.



THE DETAILS -VENUE + SET UP (CONT.)

Will you need or want a professional videographer and/or photographer to capture b-roll and images at the event? Will you have a space for video testimonies or story telling at the event? Note: events are an awesome way to capture content for other marketing uses later...and much cheaper than trying to stage all that again. What do you want included in the shot list?

If so, identify and get a contract for video/photo support as soon as possible. Typically your Accounting Division will require a W-9 and possibly some other business agreement paperwork with outside vendors that are not already a part of your vendor list. Check with your Accounting colleagues.

What information will be required to help your attendees be prepared and show up effectively to the event? Circle all special considerations attendees may need to consider here:

- Map to location
- Parking location, special parking considerations or other changes
- Location instructions (floors, rooms, wings, etc)
- Inform that photos/video will be taken
- What to bring to event (i.e. notebook, other)
- Specific uniform or dress code expected
- Program schedule (check-in, start, program end time, etc.)
- Special considerations (allergies, accessibility needs)
- Transportation schedule (if providing)
- RSVP expectations
- Hashtags to use to share about event
- Where to find more info
- Other considerations (team details, contests, fundraising, etc.)

Place a star by any of the above that may require signage to be prepared.



THE PROGRAM

What is the program or order of events? Be sure to run it by your leadership to ensure you are aligned and have considered their wishes as well. Remind them of the goal and who is attending – this helps provide focus on the program.

What people/leaders/dignitaries need to be invited? If an elected official, do they require an online invitation? You should invite elected officials at least 30 days prior if possible. For organization leadership, ensure that their schedule is blocked off well in advance for the event and any "run throughs" you may need prior to the event.

What is your time frame for presentation? Mock out a draft schedule and ensure you can fit within your presentation timeframe.

Do you need an Master of Ceremonies (MC) or other host to help make introductions and keep the program moving? Who will that be. Ensure you have a script or outline for them and a practice day scheduled to walk through the event.



THE PROGRAM

Provide talking points or a scope of comments for those who will be speaking and ask for a copy of their comments, reminding them of time limits. This helps avoid repetition among speakers and you can have the notes prepared for the podium or event on the day of in case someone forgets.

If you plan to have video or audio playing prior to the official program start, ensure that there is adequate lighting, sound, and the images are visible (i.e. too much light on screen, etc.).

Review playlist for music and ensure that nothing accidentally gets in there that has a message or lyric that does not support your brand or event purpose (i.e. no country music drinking songs at a recovery event, etc.)

Prepare an order of service agenda and share it with all speakers and presenters and sound/video personnel to ensure that the program flows well. It is helpful if you have several presenters to have a "stage hand" that can help make sure people are ready and there are no awkward gaps in the program.

Prepare a marketing plan for the event, including look, messages, what channels you will post on, how often, and any appropriate hashtags or social sharing tactics you want to use.



MAKING IT HAPPEN - EVENT WEEK/DAYS

Making the event happen takes a lot of work and then the day(s) leading up to the actual event are so important. Plan to have set up completed at minimum two hours prior to your event kick off. This allows for any unforeseen issues or delays and gives you and your team a little "peace" prior to the event beginning.

Review your final punch list and make sure you have considered all of the needed plans and elements.

Assigned a volunteer/point of contact for your major vendors - A/V, food, security, etc. so you aren't the one everyone needs at once.

Arrange a walk-through for any speakers or presenters to ensure you have what you need and are prepared for any technical surprises 1-2 days prior to the event.

Plan to complete decorations the day before if possible - trust us, this will save you some stress!

Host a meeting of your event team and volunteers several hours prior to the event to go over the final preparations, needs, and any last minute schedule changes.

Have the team meet again about 1 hour prior to the event start to confirm set up is wrapped and have them go change and take a moment to relax prior to the event. Note: we have always ensured that there were beverages, snacks, and treats for the volunteer event team to keep them motivated and to thank them for their participation.

Have all of the presenters/speakers check in with you upon arrival to the event and ensure they have what they need and know when/where to be to prepare for the program.



MAKING IT HAPPEN - EVENT WEEK/DAYS

Provide the shot list to the photographer and videographer and ensure they have direction for the event - how long, where to shoot, etc.

Have music playing (if you have it), 30 minutes prior to the event and all volunteers in their places to greet guests as they arrive.

Open doors 30 minutes prior to the event start and have your volunteers in place and ready by 30 minutes prior to event.

Have fun! Don't forget to relax, breathe and have a moment before the event starts to ensure you are bright and ready to watch your hard work go off successfully!

Keep a notepad, a note on your phone, or record voice memos of items to remember for your post-event meeting as the event goes on. Then you won't have to try to remember.

Schedule a post-event meeting and go over what worked well, where were your opportunities, what would you change for next time? Complete your final report and submit to your leadership with final numbers and impact within two weeks.



CONGRATULATIONS!

We hope this event checklist has been helpful to guide you as you plan and coordinate your next event. We're sending you the best of luck and all the good vibes for a stellar event.

WANT TO WORK WITH US?

If you are interested in having Boss Lady Consulting help coordinate and manage your next big campaign or event, let's connect. We'd love to have a no obligation call to discuss your goals and needs for the next fundraiser, community event, brand activation or launch or ceremony!

Find us at @bossladyconsult on Instagram or LinkedIn or online at www.bossladyconsult.com to connect...or follow us for more great marketing, event and customer experience tips.