

This helpful event planning checklist provides a guide or starting point for planning your event. Some customisation may be required but this should get you started and help remove some of the common pitfalls:-

Creating the event

- Assemble a committee/organising group, key people who will make the event happen. Set a schedule for the meetings.
- Agree theme and purpose - what are your objectives? What do you want the event to achieve
- Agree your audience – Define the target audience and number of attendees.
- Decide on date/time – what will work best to attract the target audience?
- Consider venues – capacity and availability, visit the venues.
- Check availability of key staff & speakers.
- Agree an event budget, look at the costs (venue hire, catering, postage, venue dressing, audio visual equipment, transport, staffing charges, marketing, conference materials etc) and establish a delegate rate (if charging delegates to attend)
- Give the event a title.
- Develop and implement a marketing plan and create a website (if appropriate), include social media
- Submit a press release – define the opportunities and benefits the event will offer the audience.
- Establish an outline programme for the event.
- Prepare a project plan with clear deadlines and target dates (work backwards from the date of the event) and allocate tasks.
- Create file archive for all conference materials.
- Seek and develop sponsors.
- Agree a contingency plan.
- Agree a sustainability plan

Before the event

- Review the budget – this should be ongoing throughout the event planning process
- Book the venue – allow time for set up.
- Put together a guest list and send out event invitations (give some consideration to how you want to do this, consider a personal phone call ahead of an official invitation).
- Consider sending a 'save the day' email.
- If the event is not by invite only, set up a delegate registration system/process – this needs to include the booking fee and payment arrangements and capture information for special dietary requirements and any other special needs.
- Decide how the venue needs to be prepared, what will be the room layouts. Do you need a registration desk? Find out what the venue can provide and what you will need to book with an external contractor eg. exhibition build.
- Discuss AV requirements with the venue. Understand what support will be available throughout the event. Do you need a dedicated technician?
- Make arrangements for refreshments, lunch and any other hospitality with the venue. When do you need to provide final numbers and details of special dietary requirements?
- Finalise the event programme.
- Purchase any merchandise, consider sponsorship opportunities to fund this.
- Prepare an event risk assessment.
- Consider any parking requirements, if coach drop off points are needed make sure they will be kept unobstructed all day.
- Advise security /consider requirements.
- Book any required accommodation for speakers.
- Send out your joining instructions, it's often useful to have these checked by the venue team. Include a copy of the agenda/programme, venue address and details, arrangements for parking, what to do on arrival, Wi-Fi access, suggestions of places to visit, things to do in the area.

Event Planners Checklist

- Create documentation for registration at the event and the delegate packs.
- Confirm final numbers with the venue along with any individual delegate requirements.
- Do you need additional signage and banners? Check what the venue are providing.
- Think about sending PowerPoint presentations to the venue before of the day of the event.
- Organise volunteers, event support staff, decide on the dress code.
- Visit the venue before the event.

During the event/on the day

- Decide who will be onsite during the event, get the key contacts for the venue (for on the day) and write an 'on the day' event itinerary, decide who will meet speakers, and where will they go.
- Identify who will be the team leader on the day and how you will troubleshoot if something goes wrong.
- Allow sufficient time for set up prior to delegates arrive.
- Do a walk round of the event to make sure everything is set up and ready (including signage).
- Run through details with the venue (programme times etc.)
- Brief stewards and make sure they are positioned at key points in the venue when delegates arrive.
- Have a communications system in place, walkie-talkies or mobile phones.
- Develop a clear signalling system for communicating with speakers and session chairs to ensure the programme runs on time.
- Have an emergency essentials box – scissors, stapler, Velcro, marker pens, drawing pins, Blu-Tack, Sellotape etc.
- Run through the event itinerary with your on site team. Confirm who will be responsible for what.
- Communicate housekeeping arrangements with attendees.
- Keep the event running on time, know what to do if it starts to overrun (advise venue etc.)

Event Planners Checklist

- Allow time for delegates to complete questionnaires/feedback forms.
- Take some photographs.
- Ensure you maintain your social media plan.

Post event

- Ensure all your equipment is removed from the venue.
- Send questionnaires to delegates/attendees (if not done on the day of the event), and ensure these are evaluated on return. Follow up feedback where appropriate, you may need to approach some attendees for more details.
- Send thank you messages to everyone that contributed including speakers, volunteers and staff.
- Evaluate the event, did it meet the objectives set? How successful was it and did it lead to benefits that you didn't expect?
- Agree and follow up any actions from during the event.
- Save all documents to shared drive.
- Complete budget reconciliation.
- Set up a debrief meeting with key stakeholders to evaluate whether the objectives for the event were met (share delegate feedback).
- Adjust website or take of line to reflect conference has happened.
- Begin working on the next event (if appropriate).

Jane Pinder

Conference and Events Manager