

Planning a Fun, Purposeful Event (Event Checklist)

1. Marketing Strategy

- a. What is this event trying to accomplish?
- b. Who are you trying to target?
- c. Is this event scalable? Could it become an event series/road show for several locations?
- d. What marketing mediums will you use?

2. Date, time, location of event

- a. What is the date of the event? Suggested Location?
- b. What time best suits an event of this nature?
- c. How do local trends, traffic, travel habits, and workdays affect the timing of this event?

3. Size of event

- a. Ideal number for optimum guest experience
- b. Physical capacity of space, amount of available seating, comfort of hosts (when event held in private homes)
- c. Budgetary limitations

4. Budget and Timeline

- a. Who will cover what portion of costs? Who approves?
- b. Prepare budget
- c. Who will perform which logistical arrangements (i.e. catering, rentals, valet)
- d. What deadlines must be established to ensure that event plans continue smoothly? How will anticipated travel and other conflicts impact those deadlines?

5. Guest List

- a. What criteria will be used to determine invitation list?
- b. Who pulls data from Advance? **FSAA**
- c. Is it an all-call, or a private donor event (involvement of Alumni group, or more strategic)

6. Invitations / Hold the Date / RSVP

- a. What is design concept in terms of shape, size, fold/no-fold, envelope/self-mailer, etc.
- b. What visual elements, imagery, logos, or color schemes do you want to use?
- c. When do we want the invitation to mail? What timeline does that deadline dictate for other decisions and actions?
- d. Who is the contact for the RSVP?
- e. Is this person handling money for ticket purchases?
- f. Is there a web link / landing page
- g. Are directions included?

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7. Catering / Food & Beverage

- a. Determine menu concept (light or heavy hors d'oeuvres? Meal served?)
- b. Any special themes relevant to the program?
- c. What items can the host provide and what items should the caterer bring including plates, utensils, glasses, trash containers, and appropriate tables?
- d. Does host or venue have a preferred caterer? Is that caterer required or simply preferred? Are other suggestions available in order to get comparison proposals?
- e. Can caterer provide beer and wine? If not, how will that be procured? Can host help with that process? Is a temporary alcohol permit necessary?

8. Physical set-up

- a. Where will reception be? Where will program be?
- b. Indoor or outdoor? Or both?
- c. If outdoor, is there a rain plan?
- d. Is there enough seating for program and/or dinner?
- e. Will all guests be able to hear in this set-up or is a small sound system required?
- f. Podium, mic or presidential seal? Branding?
- g. Where will catering be staged and served?
- h. Is there room for check-in table near entrance?
- i. Coat check needed? Where will it be?
- j. Are there any physical challenges presented by the space or the layout (steep hills, sight lines for talk, etc.)?
- k. Housekeeping or grounds keeping necessary? (Pressure wash? Blow leaves?)

9. Décor & Signage

- a. Will linens be required?
- b. Is any special signage required for the space?
- c. Any other needs for décor or special items like balloons or flags?

10. Sound / Music / AV

- a. Is house/venue sound system adequate?
- b. Is there ambient music? Who brings? Live music? Trio, piano, etc.
- c. Any AV augmentation for show & tell or presentation?

11. Parking/Directional Signage/Security

- a. Is there sufficient parking space on property or around home for self-parking?
- b. Is a valet required due to insufficient space or other physical challenges presented by the setting?
- c. Is there any signage needed in the area to denote event? At the house?
- d. Is any security needed during the event?

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12. Program

- a. Host or President's role: welcome, introductions, wrap-up
- b. Ideas about good speakers and topics for this event
- c. Length and style of program
- d. Suggested speaking points
- e. Is printed "Program" or "Menu" necessary?

13. Photography/Media/Publicity

- a. Photographer for the event if necessary?
- b. Shot list, locations and time for anything formal or staged for publicity
- c. Lighting or other setup requirements. Walk-thru prior to event.
- d. Local media or publicity?

14. Registration / Welcome / Staffing

- a. Table, linen, branding needed?
- b. Who has guest list?
- c. Nametags? Blanks for on-site?
- d. Any guest giveaways with arrival packet?
- e. Promo pieces available? Who brings?
- f. How many staff needed for check in, welcome?
- g. Volunteers?

15. Briefing Packet / Itinerary (2 weeks advance)

- a. Who does briefing packet? Itinerary?
- b. Notes on donors, strategic guests
- c. Evening program outline, introductions necessary
- d. Gift for the host.

16. Follow – up Post Event

- a. Thank yous
- b. Letters to strategic guests
- c. Wrap Report: successes, need to improve, final guest count, budget, etc.