

Steps to Plan a Successful Event

Establish Event Basics		
What	Specifics	Notes
Title		
Internal Goals		
Participant Outcomes		
Staff Responsible		
Date/Time		
Volunteers needed	Yes No Approximate Number	
Location	On-site Off-site Virtual	
Partners	Other departments Other organizations Other:	
Budget - -	Marketing Food Alcohol Swag Honorarium/appreciation gift Decor Off-site venue	
Attendees	Who is your primary audience To whom will you be sending your invitations? Other	
Registration	Required Preferred Open Fee/no fee	
External Guests (Speaker, panelist, vendor, etc)	Yes No	Do they have fees? Need travel arrangements?
Food/Catering	Yes	Who? Fees and payment timeline, final counts due

	No	
Alcohol	Yes No	Who will purchase, serve, set up?
Immediate To-Do's		
Request/confirm space if onsite		
If off-site - secure venue		
Create an event/marketing plan	Include deadline dates Include marketing items/drop dates Include communication with all audiences Social media postings Texting All other tasks	
Create event & registration sites		
Marketing requests	Invitations Signage Menu cards Other	
Schedule pre-event meeting with all partners		Review responsibilities and event details
4-6 Weeks Prior to Event		
Order food	On-site supplier Off-site vendor	
Alcohol approvals (if needed)		
Begin marketing based on event plan		
Meet with Caterer and Event Venue	Primary contacts for food source and for venue	Go over plans, timeline, select menu, discuss space allocation
Request parking permits (if needed)		
Invite external guests/speakers/presenters (non-attendees)	Include date, time, location, goals, attendee expectations.	
Establish check-in process	Registration table Virtual check-in	

0-2 Weeks Prior to Event

Confirm external guests (presenters)	<ul style="list-style-type: none"> • Include parking pass, venue map with parking locations • Include date, time, location • Include format and their responsibility 	
Confirm Attendees	<ul style="list-style-type: none"> • Send email reminder to those registered • Include date, time, location • Include any expectations 	
Confirm food (no less than 10 business days prior)	Provide final count and any food restrictions	Some off-site vendors may require more lead time
Confirm room reservation	Layout Floral Linens Final count Signage	
Pull together “day of” items	Attendee name tags Presenter name tags Swag items Check in sheets (for back up) Pen/Highlighter Scissors Tape Signage * Attendee handouts	* If not supplied by venue
If external guests, put together gift	Larger swag Thank you note Bottle of Water	

Day of Event		
Arrive 60 minutes early to ensure setups		
Bring “day of” items		
Hang signage		
Check in with Catering		
Check in with Venue manager		
Set up check in table		
Post Event		
Thank you notes	External guests Venue partner Catering partner	
Post event surveys	Attendees External guests No - shows	
Post event summary	Day of notes Budget Attendee numbers Changes for next event	Budget to include cost per participant