

Event Planning and Management Checklist

Event Name

Event Manager *(The person responsible for creating, financing and leading the event)*

Event Co-Ordinator *(The person making the arrangements for the event)*

Concept Planning

The first stage is to define why the event is planned. What will it achieve and what outcomes are we expecting. In particular consider who the target audience are, (different constituencies will have different expectations of an event in form and function) and how much money is available for the event.

Issue	Solution	Action
What is the purpose of the event?		
What are the expected event outcomes?		
Which constituencies do we need to engage?		
What budget is available for the event?		

Event Format Planning

In this second stage, the concepts explored in stage one can be expanded to develop a format for the event. In particular when planning the format check against the concept plans (especially the budget) to ensure the event is deliverable and fit for purpose.

Issue	Solution	Action
How many people need to attend?		
Who will host or facilitate the event?		
Are there any specific materials needed?		
Will the event require smaller break out groups?		
How does feedback or information need to be captured?		
How long will the event last?		

Are expert speakers needed?		
When will the event take place?		

Event Format		Action
Overall Description		
Key Activities		

Detailed Arrangements

Once the event format has been designed and agreed, the work of detail planning can begin. There are four basic areas to concentrate on namely, venue, attendees, catering and equipment.

Venue

Issue	Solution	Action
What type of venue is needed?		
Whereabouts is the venue needed?		
What venues are available?		
What special arrangements are there for using a venue?		
Venue Booked?		
Venue Confirmed?		
Venue pre-visit arranged?		
Venue Contact Details?		
Venue location plans and travel details?		
Special access arrangements?		

NB If a non-standard venue (marquee for example) is used then a separate planning checklist is needed.

Attendees

Issue	Solution	Action
How will attendees be sought?		
What advertising is		

needed?		
Invitee list arranged?		
Invitations sent out?		
Responses logged?		
Arrangements confirmed with attendees?		
Attendee badges made?		
Special arrangements met?		

Catering

Issue	Solution	Action
Is catering needed?		
Will the venue provide catering?		
Caterer booked?		
Cater contact details?		
Menu agreed?		
Catering numbers confirmed?		
Special arrangements met?		

Equipment

Issue	Solution	Action
What equipment is needed? (AV, display, computing)		
Is equipment available in -house or does it need hiring?		
Is the venue suitable to use equipment?		
What display materials are needed?		
AV equipment booked?		
AV supplier contact details		
Display equipment booked?		
Display equipment		

supplier contact details		
Computer equipment booked?		
Computer equipment supplier details		
Display materials designed?		
Display materials produced?		
Display materials contact details		