**LOGO**

**Event Planning Checklist**

**Event Program Content, Target Date and Format**

* Research dates: national, state, and local events; conflicts with president’s schedule and holiday
* Confirm dates with leadership’s calendar
* Confirm topics and program format
  + Draft program outline/topics/timeframe
  + Meet Ginger to confirm
  + Determine appropriate room set for event

**Confirm Date / Conduct Research and Site Selection**

* Conduct site research based on topic and program format/room set and available dates
* Determine estimated food/beverage costs and develop budget
* Estimate audio visual costs based on location prices
* Conduct site visits to potential locations
* Revisit budget based on confirmed location

**Promotion – Email and Event Description**

* Meeting with Communications to develop promotional plan and expectations
* Write description for event Web page
* Develop marketing piece for email blasts
* Create paper registration/sponsorship forms
* Forward description, registration text, logos, etc. to be posted to Web

**Recruit speakers**

* Solicit potential speakers from staff, committee members, industry, etc. – (four months prior)
* Draft list of potential speakers for feedback form work group and/or staff
* Confirm availability, topics, and talking points with potential speakers
  + confirm deadlines
  + request bios/photos
  + request presentation files
  + Process presenter agreement, if applicable

**Develop Script**

* Draft staging script
* Request scripting from Communications for C.A.R. leadership, if necessary

**Pre-event Logistics**

* Confirm floor plan, room set, and audiovisual needs
* Order food/beverages based on estimated number of attendees
* Monitor registrations and adjust guarantee if appropriate
* Pre-event staffing meeting
* Review on-site staffing for registration, room monitoring, audiovisual assistance, and send staffing email
* Confirm photography needs with Communications

Registration / Sponsorship / Printing

* Finalize registration fee based on budget program expenses
* Request charge codes
* Set up event in Eventbrite and Rapattoni
* Event print needs: meeting, registration and sponsor signs, on-site registration forms

**Post-Event Wrap-Up**

* Reconcile event – input onsite registrations
* Compile final invoices and update spreadsheet

**Sponsorship Recruitment**

* Develop sponsorship packages and fees
* Solicit sponsors through email, phone calls, etc.
* Request logos and ads, if appropriate, from confirmed sponsors

**Registration Processing**

* Process paper and online registration and sponsorship forms for accounting
* Enter online registration and sponsorship forms into Rapattoni
* Enter paper registrations into Rapattoni and send email confirmation

**Financial**

* Request petty cash, if appropriate
* Finalize / pay outstanding invoices or balances due
* Request travel advance (2 weeks prior)

**Event Day Preparation (2 to 3 days prior)**

* Inventory and pack event supply box
* Coordinate event day shipping
* Print name tags and tent cards
* Confirm set up for meeting room, food/beverage, exhibits, and registration desk area

**Onsite Management**

* Set up registration area
* Set up audiovisual, if necessary
* Check in registrants and distribute program materials
* Complete forms with payment information
* Write out name tags for on-site registrants

**Post-event Wrap-Up**

* Ship materials back to office
* Develop and launch post-event evaluation
* Compile, analyze, and distribute post-event evaluation results
* Distribute thank-you cards to panel members, if not done on site at the event
* Reconcile budget