

# Event Planning Checklist

## **6 to 12 Months Ahead**

- Decide event purpose (raise funds, visibility, celebration, etc.)
- Choose a theme
- Visit potential sites
- Contact an event coordinator (provided by the Mabee Center)
- Chairperson forms subcommittees
- Get cost estimates (site rental, catering, drinks, sound/lights, etc.) Mabee Center catering is handled by Sodexo
- Get recommendations for additional event vendors (Mabee Center can provide a list of preferred partners)
- Obtain bids for entertainment
- Obtain bids for decorations
- Obtain bids for design/printing
- Finance committee drafts initial budget
- Decide on admission cost
- Create sponsorship amounts/levels
- List items to be underwritten and possible sources
- Research/approach honorees
- Compile mailing list
- Check proposed date for potential conflicts, finalize date in writing
- Get written contract for site, entertainment, etc.
- Invite/confirm VIPs
- Investigate need for special permits, licenses, insurance, etc.
- Order hold-the-date cards or other event announcements
- Contact graphic artist; begin invitation design



- Consider pre-party event for publicity or underwriting (Mabee Center Marketing)
- Set marketing/public relations schedule (Mabee Center Marketing)
- Select photographer; arrange for photos of VIPs, chairman, honorees (Mabee Center Marketing)
- Get biographical information on attendees of importance such as VIPs, celebrities, honorees, chairmen (Mabee Center Marketing)
- Create logo for event with graphic artist (Mabee Center Marketing)

### **3 to 6 Months Ahead**

- Begin monthly committee meetings
- Write/send requests for funding or underwriting to major donors, corporations, sponsors
- Request logos from corporate sponsors for printing (send to Mabee Center Marketing)
- Review with graphic artist invitations, programs, posters, etc. (Mabee Center Marketing)
- Prepare final copy for invitations, return card, posters (Mabee Center Marketing)
- Prepare final copy for tickets (Mabee Center Marketing)
- Complete mailing lists for invitations
- Order invitations, posters, tickets, etc (Mabee Center Marketing)
- Sign contract with Mabee Center and turn in required deposit
- Make list of locations for posters
- Finalize mailing lists; begin soliciting corporations and major sponsors
- Obtain lists from honorees, VIPs
- Obtain radio/TV sponsors, public service announcements, promos (Mabee Center Marketing)
- Set menu with caterer for food and beverages (Mabee Center Marketing)
- Secure permits and insurance
- Get written confirmation of any celebrity participation/special needs
- Select/order any trophies and awards



## **2 Months Ahead**

- Hold underwriting or preview party to coincide with mailing of invitations; invite media
- Assemble/address invitations (with personal notes when possible)
- Mail invitations
- Distribute posters
- Finalize transportation/hotel accommodations for staff, VIPs, honorees (Mabee Center Partner Hilton Tulsa Southern Hills)
- Obtain contracts for decorations and rental items
- Confirm TV/radio participation (Mabee Center Marketing)
- Release press announcements about celebrities, VIPs, honorees (Mabee Center Marketing)
- Follow up to confirm sponsorships and underwriting (Mabee Center Marketing)
- Obtain logos from corporate sponsors for program printing (Mabee Center Marketing)
- Review need for signs at registration, directional, etc. (Mabee Center Event Coordinator)
- All major chairpersons to finalize plans (Mabee Center Event Coordinator)
- Hold walk-through of event with responsible committees, chairperson and site staff members at event site (Mabee Center Event Coordinator)
- Review/finalize budget, task sheets and tentative timeline (Mabee Center Event Coordinator)
- Start phone follow-up for table sponsors (corporate, VIP, committee)

## **1 Month Ahead**

- Phone follow-up mailing list (ticket sales)
- Place newspaper ads, follow up with news media, on-air announcements (Mabee Center Marketing)
- Confirm staff for registration, hosting, other (Mabee Center Event Coordinator)
- Contact VIPs, celebrities, programs attendees, to confirm participation
- Complete list of content for VIP welcome packets



- Get enlarged site plan/room diagram, assign seats/tables (Mabee Center Event Coordinator)
- Meet with all outside vendors, consultants to coordinate event (Mabee Center Event Coordinator)
- Review script/timeline (Mabee Center Event Coordinator)
- Continue phone follow-ups for ticket/table sales (Mabee Center Marketing)
- Continue assigning seats; set head table; speaker's platform (Mabee Center Event Coordinator)
- Confirm transportation schedules: airlines, trains, buses, cars, limos (Mabee Center Event Coordinator).
- Confirm Hilton hotel accommodations
- Prepare transportation and accommodations 9include arrival time, flight number, airline, person assigned to meet flight (Mabee Center Event Coordinator).
- Confirm special security needed VIPs event (Mabee Center Event Coordinator).
- Prepare welcome packet for VIPs, chairmen and key staff.
- Schedule deliveries of special equipment and rentals (Mabee Center Event Coordinator).
- Confirm setup and tear down times with event site (Mabee Center Event Coordinator).
- Finalize plans with Mabee Center Event Coordinator.
- Give caterer revised numbers (Mabee Center Event Coordinator).
- Meet with chairpersons and key staff to finalize any of the above details.

### **1 Week Before**

- Meet with all committees for last-minute details
- Finish phone follow-ups
- Confirm number attending (Mabee Center Event Coordinator).
- Finish seating/table arrangements (Mabee Center Event Coordinator).
- Hold training session with volunteers; finalize assignments (Mabee Center Event Coordinator).
- Secure two or three volunteers to assist with emergencies



- Finalize registration staff (Mabee Center Event Coordinator).
- Distribute seating chart, assignments to hosts/hostesses (Mabee Center Event Coordinator).
- Schedule pickup or delivery of any rented or loaned equipment (Mabee Center Event Coordinator).
- Deliver final scripts/timelines to all program participants (Mabee Center Event Coordinator).
- Finalize catering guarantee and refreshments (Mabee Center Event Coordinator).
- Confirm number of volunteers (Mabee Center Event Coordinator).
- Make follow-up calls to news media for advance and event coverage (Mabee Center Marketing).
- Distribute additional fliers (Mabee Center Marketing).
- Final walk-through with all personnel (Mabee Center Event Coordinator).
- Schedule rehearsals (Mabee Center Event Coordinator).
- Schedule volunteer assignments for day of event (Mabee Center Event Coordinator).
- Establish amount of petty cash needed for tips and emergencies.
- Write checks for payment to be made for the day of the event.

### ***Day Before Event***

- Lay out all clothes that you will need the day of the event
- Recheck all equipment and supplies to be brought to the event
- Have petty cash and vendor checks prepared

## **Event**

- Arrive early (with your change of clothes)
- Unpack equipment, supplies and make sure nothing is missing
- Be sure all VIPs are in place and have scripts
- Reconfirm refreshments/meal schedule for volunteers (Mabee Center Event Coordinator).
- Go over all final details with caterer and setup staff (Mabee Center Event Coordinator).
- Check with volunteers to make sure all tasks are covered
- Setup registration area (Mabee Center Event Coordinator).
- Check sound/light equipment and staging before rehearsal (Mabee Center Event Coordinator).
- Hold final rehearsal (Mabee Center Event Coordinator).

NOTES: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

CONTACTS: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

BUDGET: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

