

**Event Timeline Template**

Add and Edit this to fit your events. Make one for each event and then use from year to year as possible

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| **4-6 months before event or more depending on size of event** | | |
| **Item** | **Target Date** | **Completion Date** |
| Create Event Plan   * Who, What, Why, When * Goals * Connection to Plan of Work * Financial Limitations |  |  |
| Create a Budget   * Budget Tips and Tricks and Things to Consider: Go to the website |  |  |
| Select Venue   * RFP * Contract negotiation * Signed Contract |  |  |
| Book Speakers   * Speakers above $600 require PSC (Link) * May book before venue, if speaker is more critical than date or location |  |  |
| Create Preliminary Agenda of Event |  |  |
| Create Sponsor Packages If needed   * Create system for tracking sponsorships |  |  |
| Send Potential Sponsors Materials |  |  |
| Do a run through of selected venue if you are unfamiliar |  |  |
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| **2-4 months before event or more depending on size of event** | | |
| **Item** | **Target Date** | **Completion Date** |
| Create promotional materials |  |  |
| Build and Open Registration System |  |  |
| Send Promotional materials to potential participants |  |  |
| Contact caterers or facility to select menus |  |  |
| Determine AV requirements   * Make arrangements with facility or others to ensure needs are met |  |  |
| Determine Set up requirements   * Work with facility or others to ensure needs are met * How do you want the tables and chairs? * What facilitation materials are needed? * Internet? * Access to Power? * Sound? |  |  |
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| **1-2 months before event or more depending on size of event** | | |
| **Item** | **Target Date** | **Completion Date** |
| Double Check that all Contracts are signed and returned |  |  |
| Review Speaker assignments and Needs   * Make sure there is someone from the committee assigned to host each presenter/speaker if there are multiple speakers * Determine the needs of the speakers – computer, projector, sound, microphone, etc. |  |  |
| Review Menus and setups – make sure they still work based on current registrations |  |  |
| Monitor and manage registration list   * Double check to ensure payments have been made * Email billings to balance dues to try to collect all money before event * Cancel duplicates * Answer participant questions |  |  |
| Start Assembling Materials   * Educational Materials * Folders (if needed) * Create nametag template * Agendas * Invoices/paid receipts * Other materials |  |  |
| Do a final run through of the facility   * Check on best layout for meals * Check for enough electrical outlets * Plan where you want registration * Let facility know who VIP’s / Speakers are if appropriate * Confirm Guest List with Hotel if needed |  |  |
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| **10 to 15 Days Before Event** | | |
| **Item** | **Target Date** | **Completion Date** |
| Create Checklist of what you need to pack for event (keep adding to it as event gets closer)   * Start creating a pile of things that need to go with you in one spot so it is ready to go * Start tracking registrations each day canceling duplicates, double checking payments |  |  |
| Create Supply Box:   * Tape * Scissors * Pens * Sharpie Markers * Thumb Tacks * Sticky notes * Memory stick * Pins * Stapler, staples * Paper * Receipt books * Batteries * Anything else you might need |  |  |
| Create hot list of critical phone numbers |  |  |
| Create any signage needed for event |  |  |
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| **3 Days Before Event** | | |
| **Item** | **Target Date** | **Completion Date** |
| Create Master Notebook   * Run Registration List * Run Balance Due List * Run copy of invoices by number * Copy of all materials * Check list * Copy of All Contracts * Any detail lists or reports to make each section function |  |  |
| Make Name Tags (put with folders) |  |  |
| Make stickers for tops of folders if needed – with name and information of participants |  |  |
| Print Invoices (alpha order) and put in folders |  |  |
| Turn in Guarantee’s to facility (usually this is at the 3 business days before event time) |  |  |
| Get Cash to make change if needed |  |  |
| Reconfirm with speakers or if you have hosts touch base with hosts to ensure everything is all set with speakers |  |  |
| Send Participant names to speakers if needed |  |  |
| Type instructions for staff to work registrations or other stations (do a walk through in your head and add lots of details) |  |  |
| Get presentations from the speakers, if possible, in order to preload them on the computer. |  |  |
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| **1 Day Before Event** | | |
| **Item** | **Target Date** | **Completion Date** |
| Pack all materials |  |  |
| Pack extra packets, name badges, etc. |  |  |
| Double check registration list and balance dues – update any invoices, etc. |  |  |
| If possible, go over instructions with volunteers - best if done onsite |  |  |
| Double check to do list – and make sure everything pre-event is complete |  |  |
| Walk through event in your head think about challenges and solutions – make a list so if they arise you can quickly refer to the list to address it |  |  |
| Preload any presentations onto the computer. |  |  |
|  | | |
| **Days of Event (especially day 1)** | | |
| **Item** | **Target Date** | **Completion Date** |
| Unload everything and Check in with hotel/facility staff   * Ask for business cards or contact numbers |  |  |
| Get out your master notebook and follow your checklist |  |  |
| Set up registration area |  |  |
| Set up presentation rooms |  |  |
| Welcome guests and handle registrations   * Accept payments * Make note of those paying to follow up after event * Answer questions as needed |  |  |
| Help speakers get set and comfortable with room |  |  |
| Ensure all necessary AV equipment is in place and functioning correctly. |  |  |
| Run through each day in your head think about challenges and what solutions exist |  |  |
| Double check that everything is set for each transition at least one hour before the transition happens to make sure everything is set |  |  |
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| **After the Event** | | |
| **Item** | **Target Date** | **Completion Date** |
| Follow up on Balance Dues |  |  |
| Send out evaluation if not done onsite |  |  |
| Write thank you letters to speakers and others who need thank you letters |  |  |
| Pay invoices |  |  |
| Finish Budget with actuals |  |  |
| Synthesize evaluations |  |  |
| Write MIPPRS Report |  |  |
| Be sure to add to your check list anything you think you might have missed so you have it for next year |  |  |
| Be sure to put your master notebook in order for next year |  |  |