

Event Task List

EVENT NAME:

Date commencing:

Time commencing:

Date ending:

Time ending:

*Use in conjunction with the **Event Budget Planner** for a detailed breakdown of requirements*

	DATE ASSIGNED	PERSON RESPONSIBLE	DATE COMPLETED	NOTES
Overview / Venue				
Determine budget				
Determine the event's purpose and objectives				
Decide on how you will determine the event's success				
Determine types of attendees and their expectations, requirements and preferences				
Decide upon a theme				
Decide upon an event name/tagline				
Determine rough outline of event schedule				
Assign responsibilities for each component of the event:				
Venue				
Equipment				
Decorations				
Food and beverages				
Parking and transportation				
Audio/Visual				
Entertainment/Speaker				
Design, printing and registration				
Advertising				
Publicity and marketing				
Staff travel and accommodation				
Administration				
Security				
Emergency contingency plans				
Determine sponsorship/partner participation, what sponsors will receive, and fees				
Secure sponsors/partners				
Brainstorm locations				
Visit potential sites				
Gather estimates for venues				
Determine venue and date				
Secure venue and date				
Pay venue deposit				
Pay venue balance				
Confirm pre-event access time, venue closing time (following event) and post-event access time				
Confirm access for equipment and disabled guests				
Confirm venue capacity and agreed cut-off number				

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	DATE ASSIGNED	PERSON RESPONSIBLE	DATE COMPLETED	NOTES
Confirm emergency evacuation procedures (ensure all staff, suppliers and guests are made aware)				
Confirm location of all bathroom facilities (ensure all staff, suppliers and guests are made aware)				
Determine registration fee and method of payment				
Create a site plan				
Create set-up plan				
Create clean-up plan				
Investigate the need for permits/licences/insurance				
Arrange permits/licences				
Pay for permits/licences				
Arrange insurance				
Pay for insurance				
Conduct 1st walk-through of venue/meet with Venue Manager to discuss details				
Conduct 2nd (final) walk-through				
Finalise venue details				
Hold rehearsal if required				
Collect keys/alarm code				
Return keys				

Equipment Rentals

Assess required rental items				
Gather estimates				
Secure vendors / place orders				
Do a final check that supplier has all information they require				
Pick up rental items				
Return rental items				

Décor/Decorations

Assess needed decorations				
Gather estimates				
Secure vendors / place orders				
Do a final check that supplier has all information they require				
Pick up decorations or arrange delivery				
Return decorations				

Food and Beverage (Catering)

Food				
Determine food requirements				
Estimate number attending				
Gather caterer estimates				
Choose menu and confirm requirements in writing				
Ensure enough staff to cover event (e.g. waiters)				
Confirm number attending				

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	DATE ASSIGNED	PERSON RESPONSIBLE	DATE COMPLETED	NOTES
Do a final check that supplier has all information they require				
Pay deposit				
Pay balance				
Beverages				
Determine beverage requirements				
Estimate quantity required				
Gathers supplier estimates				
Confirm requirements in writing				
Ensure enough staff to cover event (e.g. bar staff, Duty Manager, etc)				
Confirm quantities				
Do a final check that supplier has all information they require				
Collect beverages, glassware, icebuckets, liquor containers				
Make payment				
Return unused beverages and pay on a sale-and-return basis				
Purchase ice				
Cash float for bar				
Parking and transportation				
Confirm event parking or public car parks close to venue				
Organise parking permits				
Organise transportation (vehicles and drivers) for guests, entertainment/ speaker and staff				
Organise road or area barricades/cones				
Audio/Visual				
Finalise all components of event that will require AV resources				
Determine AV equipment needed				
Secure AV vendor				
Finalise contract				
Pay deposit				
Do a final check that supplier has all information they require				
Pay balance				
Arrange wireless internet access				
Entertainment / Speaker				
Brainstorm options (e.g. pre-recorded music, band, DJ, speaker, jukebox, comedian, magician)				
Gather estimates				
Determine other expenses (e.g. travel, accommodation, rider)				
Confirm supplier and sign contract				
Pay deposit				
Request bio and publicity photo				

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	DATE ASSIGNED	PERSON RESPONSIBLE	DATE COMPLETED	NOTES
Finalise travel, accommodation, rider and meals				
Prepare and distribute itineraries				
Do a final check that supplier has all information they require				
Pay balance				

Design, Printing and Registration

Select graphic designer				
Create event logo				
Secure URL for website or microsite				
Create website or microsite				
Create eDM template				
Determine and compile list of invitees				
Create invitation for eDM or print				
Send invitation				
Track RSVPs				
Send eDM with essential attendee information				
Create name tags				
Determine signage requirements				
Design and print signage				
Design/create advertising (print/radio/social, tv)				
Design/create PR material (media kit)				
Create information pack for attendees				
Create registration desk collateral (sign in sheet, programme, credentials)				
Purchase credentials lanyards and plastic pockets				
Design and produce certificates/awards				

Advertising

Set schedule for advertising				
Create email mailing list				
Send periodic eDMs				
Send final eDM				
Create social media pages				
Regularly post to social media pages				
Place advertising (print/radio/tv/social)				
Track and report on advertising				

Publicity and Marketing

Gather photography estimates				
Choose and book photographer				
Pay photographer deposit				
Pay photographer balance				
Gather videographer estimates				
Choose and book videographer				
Pay videographer deposit				
Pay videographer balance				
Draft publicity plan				

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	DATE ASSIGNED	PERSON RESPONSIBLE	DATE COMPLETED	NOTES
Create media kit				
Implement publicity plan				
Send invitations to media				
Confirm media attendance				
Track and report on PR				
Arrange press room equipment (e.g. wireless internet, computers, copiers)				
Arrange post-event PR				

Staff Travel and Accommodation

Finalise travel, accommodation and meals				
Prepare and distribute itineraries				

Administration

Hold regular planning meetings and distribute meeting minutes				
Draft the budget				
Finalise the budget				
Track budget weekly				
Set tentative timeline for event				
Set final timeline				
Collect registration fees				
Collect sponsorship fees				
Plan registration table				
Print off finalised attendee list				
Cash float for registration table				
Arrange for staff/helpers/volunteers				
Prepare rosters and staff/volunteer instructions				
Confirm an MC				
Co-ordinate shipping/delivery of event collateral, product, etc				
Create run sheet and distribute				
Create on-the-day task sheets and distribute				
Create welcome packs/goodie bags				
Write scripts				
Plan and pack an on-site kit: extra extension cords, multiple power sockets, contact lists, run sheet, all supplier information, sticky tape, heavy duty tape, scissors, pens, stapler and staples, Blu-Tack, hammer and nails				
Send thank you notes/gifts				
Conduct de-briefing session				

Security

Determine security requirements (for venue and/or guests)				
Book supplier				
Pay deposit				
Pay balance				

Emergency Contingency Plans

Create an emergency contingency plan, listing contacts for (and nearest location of): fire, ambulance/accident and emergency clinic, police, coastguard, power, etc.

Arrange a trained first aid person to be on-site

Organise fire extinguisher(s)

Trade Show Checklist

Request, complete and return application form

Pay deposit

Pay balance

Request booth location

Receive exhibitor pack

Determine needs for booth (e.g. tables, chairs, other furniture, electricity, carpeting, wall coverings)

Book hire equipment

Plan and order signage

Plan and order graphic design and printing

Design and print promotional collateral (e.g. brochures, business cards)

Brainstorm promotion ideas to encourage show attendance/traffic

Action promotion ideas

Publicise attendance at the show to clients, customers, public

Design premiums

Order premiums

Create press materials

Create lead sheet

Arrange travel, accommodation and meals for staff attending

Create and distribute itineraries

Follow up and finalise all booth arrangements

Plan and pack an on-site kit: collateral, lead sheet, extension cords, multiple power sockets, return shipping labels, contact lists, sticky tape, heavy duty tape, scissors, pens, stapler and staples, Blu-Tack, hammer and nails

Co-ordinate shipping/delivery of event collateral, product, etc

Plan set-up procedure

Plan pack-down procedure

Plan staffing roster and distribute

Conduct post-show follow-ups with leads, fulfilling info or product requests

Conduct debrief of event