Front matter: Master Event Planning Checklist

Why It's Important

This checklist is the full roadmap for an event, from the first planning meeting a year out to the final post-event debrief. It breaks the work into time blocks so nothing important gets left to the last minute, and it turns a large, daunting project into a series of manageable tasks. Treat it as a living plan rather than a fixed list. Assign an owner to every task, check items off as you go, and adjust the timing to match your event and your team.

How to Use

1. Copy the checklist into your project tool or a shared document.
2. If your event is less than twelve months away, start at the time block that matches your lead time and compress the earlier steps.
3. Assign a task owner to every line. A task with no owner rarely gets done.
4. Review the checklist at each committee meeting and mark progress.
5. Add any tasks specific to your event, such as a parade route, a beer garden, or a children's area.
6. After the event, note what you would change and save the updated version for next year.

What You Need

- An event date, a purpose, and a rough attendance target.
- A committee with named leads for the main areas: finance, marketing, volunteers, logistics, and sponsorship.
- A shared project tool or document the whole team can see.
- Your budget and event timeline open alongside this checklist, since the three work together.

Event Ready Master Event Planning Checklist template

Operational Best Practice: Do not view this as a rigid list, but as a dynamic project management framework. Assign a "Task Owner" to every bullet point in your project management software (Asana, Monday.com, Trello) to ensure accountability.

> **How to use this checklist.** This is the detailed task list. The Event Timeline template is the calendar summary of the same year, so use them together: plan the month on the timeline, then work the tasks here. If your event is less than twelve months away, start at the time block that matches your lead time and compress the earlier steps. Pair this checklist with the Budget, Event Timeline, Volunteer Database, and Accessibility Checklist templates in this toolkit.

12 Months Before (Strategic Planning & Foundations)

- **Planning:** Define event purpose, goals, and KPIs (the few numbers that show the event worked, such as attendance or funds raised). Establish the Event Committee.
- **Budget:** Draft the preliminary high-level budget. Determine ROI metrics (what you expect to get back for what you spend).
- **Venue:** Research and shortlist venues based on capacity, location, and brand alignment.
- **Sponsors:** Create sponsorship tiers and a prospectus (a short pitch document for sponsors). Begin outreach to your largest sponsors.
- **Compliance:** Review local regulations, accessibility requirements (use Canadian and BC standards, and see the Accessibility Checklist in this toolkit), and tax implications.
- **Risk Management:** Draft initial Risk Management Matrix (identifying high-level operational, financial, and reputational risks).
- **Insurance:** Research and secure General Liability and Event Cancellation insurance quotes.

6 Months Before (Vendor Lock-in & Marketing Launch)

- **Venue:** Sign the venue contract. Ensure cancellation/clause policies are reviewed by legal.
- **Permits:** Apply for necessary permits (noise, street closure, alcohol, fire safety).
- **Vendors:** Release RFPs for major vendors (written requests for quotes). Secure Audio/Visual (A/V), production, and decor.
- **Catering:** Secure caterer. Plan menus, ensuring options for vegan, gluten-free, and allergen-safe meals.
- **Entertainment:** Book keynote speakers, bands, or specialized entertainment. Sign contracts.

- **Marketing:** Launch event website. Open early-bird registration. Announce via email and social media.
- **Sponsors:** Confirm sponsor booth layouts and custom integrations.
- **Technology:** Select event management platform (registration, ticketing, mobile app).

3 Months Before (Logistics & Team Building)

- **Registration:** Close early bird. Launch standard ticket pricing. Track registration pace.
- **Staffing:** Hire event day staff (managers, stage managers, registration leads).
- **Volunteers:** Open volunteer applications. Draft shift schedules and role descriptions.
- **Logistics:** Draft floor plan and booth layouts. Submit to fire marshal if required.
- **Accessibility:** Finalize accessibility plans (ASL interpreters, wheelchair ramps, sensory-quiet rooms, closed captioning for virtual).
- **Sustainability:** Implement green initiatives (e.g., digital tickets, zero-waste catering, carbon offset options).
- **Communications:** Draft all attendee email templates (confirmations, reminders, FAQs).

1 Month Before (Finalization & Compliance)

- **Vendors:** Finalize all vendor contracts and logistics. Confirm load-in/load-out schedules.
- **Catering:** Submit final headcount guarantee to caterer.
- **Technology:** Conduct A/V and virtual platform dry runs. Test Wi-Fi bandwidth at the venue.
- **Risk Management:** Finalize contingency plans (weather, medical emergencies, speaker cancellations, power outages).
- **Insurance:** Ensure all vendors have submitted their Certificates of Insurance (COI) naming your organization as additionally insured.
- **Permits:** Verify all permits are approved and printed.
- **Marketing:** Launch final marketing push. Send "Know Before You Go" emails.

2 Weeks Before (Briefings & Checks)

- **Staffing/Volunteers:** Host mandatory training sessions and briefings for staff and volunteers.
- **Logistics:** Finalize Run of Show (ROS) document. Distribute to all department heads.
- **Communications:** Send venue maps, parking instructions, and agenda to attendees.
- **Sponsors:** Send final sponsor briefing packet.
- **Technology:** Finalize virtual/hybrid platform settings. Ensure recorded content is backed up.

1 Week Before (Lockdown & Contingency)

- **Budget:** Reconcile all vendor invoices. Ensure all final payments are scheduled.

- **Registration:** Close online registration. Prepare on-site check-in systems (print badges, scan devices).
- **Logistics:** Pack and ship event kits, signage, and office supplies to the venue.
- **Risk Management:** Final review of medical and safety protocols with venue security. Identify nearest hospitals and urgent care centers.

Event Day (Execution)

- **Logistics:** Conduct venue walk-through. Oversee load-in and vendor setup.
- **Technology:** Perform final A/V and microphone checks 2 hours before doors open.
- **Staffing/Volunteers:** Distribute radios, lanyards, and schedules. Conduct morning huddle.
- **Registration:** Open registration desk. Monitor traffic flow and troubleshoot tech issues.
- **Communications:** Use a centralized Slack/Teams channel or radios for real-time internal communication.
- **Risk Management:** Monitor weather, crowd density, and safety protocols continuously.
- **Sustainability:** Ensure waste sorting stations are monitored and utilized correctly.

Post-Event (Wrap-up & Analytics)

- **Logistics:** Oversee load-out. Ensure venue is clean and undamaged to secure deposit returns.
- **Budget:** Reconcile final budget. Pay outstanding invoices.
- **Communications:** Send "Thank You" emails to attendees, sponsors, speakers, and volunteers. Send post-event surveys within 48 hours.
- **Marketing:** Share highlight reels, photos, and key metrics on social media.
- **Planning:** Host an internal post-mortem meeting. Document "Lessons Learned" and update this checklist for future scalability.