

**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?
 |  |  |
|  |
| **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  |  |  |
|  |  |  |
| **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.  |  |  |
|  |  |  |
| **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. |  |  |
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| **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  |  |  |