

# Event Planning Time Line & Checklist

## Planning committee:

Event name: \_\_\_\_\_

Event date: \_\_\_\_\_ Event time \_\_\_\_\_ to \_\_\_\_\_

Event location: \_\_\_\_\_

Targeted audience: \_\_\_\_\_

Estimated attendance: \_\_\_\_\_ Event budget \_\_\_\_\_

Event sponsors(s): \_\_\_\_\_

Event goals & objectives: \_\_\_\_\_

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Brief event description: \_\_\_\_\_

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**(Date) – 1 Year before event**

- ☐ Establish event committee or hire event planner.
- ☐ Review past year's evaluations for an annual event.
- ☐ Determine target audience.
- ☐ Develop event goals and objectives. (If the event is planned for a school audience, also determine to which state academic standards the event will correlate.)
- ☐ Decide what the committee wants event to look like (performances, craft tables, parade, etc.). Can the described event meet the established goals and objectives?
- ☐ Seek sponsors and/or partners.
- ☐ Determine location.
- ☐ Finalize date.
- ☐ Put event on the community calendar, the state of Kansas Travel and Tourism calendar, [www.travelks.com](http://www.travelks.com), will automatically link to the Kansas 150 calendar of events ([www.ks150.org](http://www.ks150.org)), and other calendars as appropriate.
- ☐ Establish budget.
- ☐ Select event coordinator and assistant coordinator.
- ☐ Contact key performers, celebrities, and/or speakers.
- ☐ Review and modify the time line as needed.
- ☐ Create organization system for planning (notebook, files, spreadsheets, information tables, etc.)
- ☐ Assign subcommittees as needed.
- ☐ Establish guidelines for choosing booths, bands, performers, etc.
- ☐ If the event is to be held outdoors arrange for an alternate indoor location if weather problems arise.

**(Date) – 9 Months before event**

- ☐ Confirm site location. Apply for appropriate permits. Arrange relevant logistics for facility, street closing, etc.
- ☐ Program of event is drafted out. Review — does it support the goals and objectives of the event? Does it fit the target audience?
- ☐ Review possible speakers, performers and/or entertainers. Select first choice and determine second choice if first is unavailable. Contact, confirm, and get contract signed.
- ☐ Assemble list of vendors, demonstrators, or others you would like to participate in the event. Plan and assemble packets for them.
- ☐ Prepare promotional plan and logos. Begin early promotion of the event.
- ☐ Secure necessary insurance.
- ☐ Seek financial backers.

**(Date) – 6 Months before event**

- ☐ Review and revise budget and financial plan.
- ☐ Review event goals and revise if necessary.
- ☐ Invite vendors, demonstrators or others you would like to participate. Send out information packets.
- ☐ Order supplies.
- ☐ Determine staffing needs and identify possible ways to meet these needs.
- ☐ Produce PSA (public service announcement).
- ☐ Send announcements, invitations, press release.
- ☐ Develop logistic plan and map.
- ☐ Determine security needs.

**(Date) – 3 Months before event**

- ☐ Review and revise budget and financial plan.
- ☐ Prepare registration/access system.
- ☐ Recruit volunteers.
- ☐ Confirm audio/visual needs.
- ☐ Arrange for housing and transportation for out of town presenters.
- ☐ Secure event materials (t-shirts, brochures, fliers, etc.)
- ☐ Send material to printers.
- ☐ Order signs, flags, booths, portable toilets, garbage collection containers, etc.
- ☐ Recruit volunteers.
- ☐ Establish menu or confirm food and drink vendors (check on food licenses).
- ☐ Arrange for security, parking attendants, and people to set-up, take-down and clean up for the event.
- ☐ Send out promotional materials.
- ☐ Determine evaluation format and develop evaluation materials.
- ☐ Establish first aid, information booth and hospitality locations; staff; and supplies.
- ☐ Order name tags.

**(Date) – 1 Month before event**

- ☐ Review and revise budget and financial plan.
- ☐ Prepare a daily activity calendar for the remaining month.
- ☐ Send promotional materials.
- ☐ Review entire event. Double check details and verify that all work is accurate and complete.
- ☐ Walk through event with committee as if you are a participant; look for problems and needs.
- ☐ Re-confirm with all speakers, vendors, staff and suppliers. Send necessary information such as maps, directions, instructions, etc.



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- ☐ Prepare staff and volunteer training, scheduling, and evaluations.
- ☐ Order equipment needed to expedite communication and transportation during the event (walkie talkies, golf carts, etc.) Assemble list of cell phone numbers for people working the event.
- ☐ Prepare final site map/diagram and set-up information.
- ☐ Arrange for someone(s) to photograph the event.
- ☐ Notify neighboring businesses/residents of the event (required by some permit processes).

**(Date) – 2 Weeks before event**

- ☐ Review and revise budget and financial plan.
- ☐ Arrange, and schedule time for, media interviews
- ☐ Collate event materials (programs, gift bags, evaluations, etc.)
- ☐ On site review with staff of event plan/logistics
- ☐ Determine when you will decide to change locations if weather problems arise (move from outdoor location to indoor location). Assemble a list of who will be notified and how.

**(Date) – 1 Week before event**

- ☐ Review and revise budget and general financial plan.
- ☐ Train volunteers

**(Date) – 1-2 Days before event**

- ☐ Set up

**(Date) – Day of event**

- ☐ Arrive early, manage event, leave late.
- ☐ Acknowledge event partners, sponsors, participants, and helpers.
- ☐ Distribute evaluations.
- ☐ Network with participants, vendors, and visitors.
- ☐ Talk to media.

**(Date) – 1 Week after event**

- ☐ Debrief with all staff.
- ☐ Send thank you letters.
- ☐ Review bills and prepare invoice payments.
- ☐ Prepare brief final report (including photos and financial report).
- ☐ Assess evaluations and determine if event will continue next year with the recommendations
- ☐ Send photos and write-up to appropriate media and newsletters.

**(Date) – 1 Month after event**

- ☐ Review all evaluations.
- ☐ Weed, sort and organize files.
- ☐ Compile program report that documents event for future reference/referral when planning future events. For annual event, compare it with past years.

*This form is adapted from The Museum Educator's Manual: Educators Share Successful Techniques by Anna Johnson, Kimberly A. Huber, Nancy Cutler, Melissa Bingmann and Tim Gove.*