

## Event Timeline Template

Add and Edit this to fit your events.

4-6 months before event or more depending on size of event		
Item	Target Date	Completion Date
Create Event Plan <ul style="list-style-type: none"> <li>Who, What, Why, When</li> <li>Goals</li> <li>Connection to Plan of Work</li> <li>Financial Limitations</li> </ul>		
Create a Budget Things to Consider: Approval at Meeting		
Select Venue		
Book Speakers/Band/Contractors <ul style="list-style-type: none"> <li></li> </ul>		
Create Preliminary Agenda of Event		
Create Sponsor Packages If needed <ul style="list-style-type: none"> <li>Create system for tracking sponsorships</li> </ul>		
Send Potential Sponsors Materials		
Do a run through of selected venue if you are unfamiliar		
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 <ul style="list-style-type: none"> <li>Make arrangements with facility or others to ensure needs are met</li> </ul>		
Determine Set up requirements <ul style="list-style-type: none"> <li>Work with facility or others to</li> </ul>		

<p>ensure needs are met</p> <ul style="list-style-type: none"> <li>• How do you want the tables and chairs?</li> <li>• Table Clothes</li> <li>• Decorations</li> <li>• Internet?</li> <li>• Access to Power?</li> <li>• Sound?</li> </ul>		
<b>1-2 months before event or more depending on size of event</b>		
<b>Item</b>	<b>Target Date</b>	<b>Completion Date</b>
Double Check that all Contracts are signed and returned		
<p>Review Speakers/Band/Contractors</p> <ul style="list-style-type: none"> <li>• Make sure there is someone from the committee assigned to host each presenter/speaker if there are multiple speakers</li> <li>• Determine the needs of the Speakers – computer, projector, sound, microphone, etc.</li> </ul>		
Menus and setups – make sure they still work based on current registrations		
<p>Monitor and manage registration list</p> <ul style="list-style-type: none"> <li>• Cancel duplicates</li> <li>• Answer participant questions</li> </ul>		
<p>Start Assembling Materials</p> <ul style="list-style-type: none"> <li>• Educational Materials</li> <li>• Folders (if needed)</li> <li>• Create nametag template</li> <li>• Agendas</li> <li>• Invoices/paid receipts</li> <li>• Other materials</li> </ul>		
<p>Do a final run through of the facility</p> <ul style="list-style-type: none"> <li>• Check on best layout for meals</li> <li>• Check for enough electrical outlets</li> <li>• Plan where you want</li> </ul>		

registration <ul style="list-style-type: none"> <li>• Let facility know who VIP's / Speakers are if appropriate</li> <li>• Confirm Guest List with Hotel if needed</li> </ul>		
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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) <ul style="list-style-type: none"> <li>• Start creating a pile of things that need to go with you in one spot so it is ready to go</li> <li>• Start tracking registrations each day canceling duplicates, double checking payments</li> </ul>		
Create Supply Box: <ul style="list-style-type: none"> <li>• Tape</li> <li>• Scissors</li> <li>• Pens</li> <li>• Sharpie Markers</li> <li>• Thumb Tacks</li> <li>• Sticky notes</li> <li>• Memory stick</li> <li>• Pins</li> <li>• Stapler, staples</li> <li>• Paper</li> <li>• Receipt books</li> <li>• Batteries</li> <li>• Anything else you might need</li> </ul>		
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 <ul style="list-style-type: none"> <li>• Run Registration List</li> <li>• Run Balance Due List</li> <li>• Run copy of invoices by number</li> <li>• Copy of all materials</li> <li>• Check list</li> <li>• Copy of All Contracts</li> <li>• Any detail lists or reports to make each section function</li> </ul>		

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

	Target Date	Completion Date
_____		
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 venue/facility staff <ul style="list-style-type: none"> <li>Ask for business cards or contact numbers</li> </ul>		
Get out your master notebook and follow your checklist		
Set up registration area		
Set up presentation rooms		

Welcome guests and handle registrations <ul style="list-style-type: none"> <li>• Accept payments</li> <li>• Make note of those paying to follow up after event</li> <li>• Answer questions as needed</li> </ul>		
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		

**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		
_____ Budget with actuals		
_____		
_____		
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		

