



General Event Checklist

Event Title: _____ Type of Event: _____

Nonprofit Contact: _____ Phone: _____ Email: _____

Event Chair: _____ Phone: _____ Email: _____

Event Location: _____

Event Date: _____ Start Time: _____ End Time: _____

Committees

- Identify individuals for event chairs and event committees
- Assign volunteers to specific committees (i.e. Auction Committee, Invitation Committee, etc.)
- Create committee contact roster and nonprofit contact roster
- Arrange initial launch meeting

Nonprofit Input

- Meet with nonprofit team and discuss overall goals
- Identify volunteers for event chairs and event committees from organization's database
- Acquire nonprofit collateral material for volunteer committees
- Familiarize yourself with rules and restrictions of nonprofit
- Familiarize yourself with Board of Directors and Staff of organization
- Procure Donor and Resource lists from nonprofit

Committee Management

- Schedule all meetings in advance up to date of event
- Create Meeting Agenda template for your meetings
- Schedule date for visit with nonprofit organization
- Create Master Calendar to oversee deadlines and payment schedules for vendors
- Create email contact group for all your committee members and nonprofit team
- Send all volunteers email with Master Calendar and Committee Roster
- Arrange meeting with committee Chairs prior to first general committee meeting



Treasurer

- Receive all information on existing bank accounts and acquire check books

(or open new checking account if one does not already exist)

- Receive all information on Paypal or other online accounts (or open new Paypal account if one does not already exist)

- Create budget for event based on historical data from past events or pertinent data

- Create budget spreadsheet for Event Chairs

- Determine ticket pricing for event

- Work with Event Chairs to create payment schedules for vendors

- Research options for guest payment processing at event, and decide which method will work best for your event

- Write checks to vendors for deposits as you receive each contract. Keep detailed notes of deposits and outstanding balances due

- Update committees on Income and Expenses for event as the planning progresses

- Create list of patrons and sponsors for the Decoration committee to include in signage. The same list will be sent to the Programs committee for inclusion in the event program

- Create a protocol for processing any payments during the event - Check In income, Silent and Live Auction income, Opportunity Drawing income, ASK income, straight donations

- Determine who will be doing cashiering during the event

- If doing a Live Auction and/or ASK, arrange for volunteer runners to help process the payments

- Make arrangements for Check Out including payment processing materials

- Create Thank You letter which will be sent to all who make donations and purchases at the event

- Before event, meet with the Cashiering team and go over payment processing protocol

- After event, send Thank You letters as soon as possible

- Create Profit & Loss spreadsheet of event for Event Chairs

Silent Auction, Live Auction and Opportunity Drawing

- Acquire solicitation permit for your city if one is required

- Create "Wish List" for your committee members



- Determine location for storing and organizing donated auction items
- Create Donation Letter for your committee members
- Create spreadsheet for tracking donations received
- Reach out to your non-profit's Board for donation of items
- Regularly update your committees about progress with donations
- Create Auction Donation List from your spreadsheet data
- Email Auction Donation List to committee members and guests attending the event
- Create Thank You letter and send to item donors as their donations are received
- Choose your Live Auction items and Opportunity Drawing items from your donations
- Schedule date for organizing donation items and creating gift baskets
- Purchase materials necessary for creating gift baskets
- Create donation bid sheets and display sheets.
- Get pens and clip boards and display stands for Silent Auction
- Determine if close out times will be staggered or if entire Silent Auction will close at the same time
- Determine method for displaying and executing Opportunity Drawing
- Arrange for "raffle runners" to sell raffle tickets during cocktail hour
- Determine protocol for Check Out of Silent Auction and Live Auction and create detailed instructions
- Schedule pickup and delivery of all items
- Create schematic outlining where each Silent Auction item will be placed
- Create signage to designate specific groupings of Silent Auction items
- Work with the Treasurer to streamline the Check Out process
- Make arrangements for unsold auction items to be returned to the nonprofit organization for return to donor or use at another of the organization's events
- Follow up on items left by auction winners

Sponsorship & Donations

- Work with your nonprofit organization to create a list of potential sponsors and patrons



- Determine sponsorship levels and perks
- Create a Patron Sponsor Drive which will allow guests to make donations and underwrite the costs of the event in advance
- Create Sponsorship Package which includes collateral material and information on sponsorship levels
- Make spreadsheet in order to track donations and sponsorships
- Meet with your nonprofit Board to promote their participation as sponsors and donors
- Obtain logos from sponsors to be used in collateral material
- Ensure sponsors and donors will receive promised perks at event
- Create Thank You letter to be sent to all donors and sponsors upon receipt of funds
- Send list of sponsors and donors and logos to Programs committee and Invitations committee for inclusion of names in invitations, event program and signage
- Create PDF Sponsor Package to be mailed to committee and Board for forwarding to friends and colleagues
- Arrange with Venue committee for a display table and any AV equipment for your nonprofit's collateral material and videos
- Make arrangements with nonprofit organization for all unused collateral material to be returned to their offices after the event
- Updated Donor and Sponsor spreadsheets so they will be up-to-date for next year's event committee

Venue and Catering

- Outline venue needs based on budget and anticipated guest count
- Research venue options based on location and pricing
- Visit venues and meet with Banquet staffs
- Create cost/benefit comparison chart outlining for venue options
- Choose venue - sign contract and note payment schedule on general calendar
- Determine audio visual needs for event and research AV vendor options
- Schedule Tasting for event menu with venue or caterer
- Get Loading Dock instructions and directions from venue

- Create schematics for pre-event spaces and main event area
- Double check electrical needs of all vendors participating in event
- Assess security needs and if necessary contract private security detail
- Finalize BEO with Banquet staff
- Create loading dock schedule for deliveries, set up and breakdown
- Guest count relayed to Banquet staff
- Finalize seating chart with Invitation committee and send information to Banquet staff
- Confirm number of tables with Decoration committee
- Arrange for refreshments for set-up volunteers, Talent and green room
- Meeting with Banquet manager and Onsite Coordinator for day of event

Invitations and Guest Management

- Determine style and motif for event
- Research graphic designers and printers for all event materials
- Meet with graphic designer to initiate event material design process
- Create Save The Date
- Send Save The Date
- Determine if your city requires a solicitation stamp on the invitation
- Finalize design of invitation and collateral materials
- Update and correct Master Mailing List
- Discuss RSVP protocol and guest list management with Event Chairs
- Create mailing labels or contract for printing of envelopes
- Assembly and mailing of invitations
- Create guest list and table groupings using spreadsheet
- Send PDF invitation as follow up to paper invitations

- List event on online Event Calendars and Event Brite
- Finalize guest seating chart
- Meeting with Banquet staff and Onsite Coordinator to discuss final seating chart
- Create Master Guest List for Check In team at event
- Correct Master Mailing List for future events and mailings

Programs and Collateral Material

- Research different styles of event program layout and determine which is best for your event
- Research printers and graphic designers
- Create a design for event program that compliments the overall event design
- Accumulate advertisement graphics and start inputting into layout
- Create bios for speakers and talent and honorees and input into layout
- Finalize sponsor and donor names and logos and input into layout
- Work with nonprofit to proof program mock up for spelling, grammar and content
- Finalize event program and send to printer
- Work with your nonprofit to determine what collateral material will be available at the event and create information packets for guests
- Work with Venue committee to determine placement of nonprofit's informational table at event
- Arrange for delivery of event programs and collateral material to event venue
- Arrange for unused collateral material to be returned to nonprofit organization's offices after event

Decor and Signage

- Determine motif and style of your event
- Create overall design plan for your event outlining signage needs, floral needs and other decor items



- Determine if there are to be gift bags for guests and solicit items for these bags
- Meet with florist to discuss floral centerpiece options and costs
- Determine if your centerpieces will be sold or raffled at the event and make necessary arrangements
- Create Step And Repeat with logos of sponsors and your nonprofit organization
- Have volunteer team ready for placement of floral on tables and assembly of the guest gift bags the day of event set up
- Arrange for easels and table top frames for your posters and displays
- Arrange for any reusable displays to be returned to your nonprofit organization's offices

Marketing and Social Media

- Create a marketing plan that outlines your intended use of social and traditional media
- Create a Facebook event page and invite your committee to promote the page
- Contact local newspapers and discuss options for having them promote your event
- Have your nonprofit organization blog about the upcoming event through their social media channels
- Send out press releases promoting your event's honorees and speakers and entertainment
- Consider partnering with local retail businesses or restaurants who can help boost awareness of your upcoming event by displaying posters or collateral material
- Contract a photographer to take photos during your event. Consider hiring a videographer as well
- Post your event on Eventbrite and other online calendars
- Invite local star bloggers to attend your event as media guests
- Invite local traditional media to attend your event



Volunteers and Staffing

- Collaborate with your nonprofit organization to determine potential volunteers
- Identify staff people from your nonprofit organization who will be onsite during the event pitching in to help
- Create a volunteer job matrix that outlines what volunteer positions are available and the number of volunteers/number of hours for each position
- Reach out to local colleges and volunteer organizations to enlist their aid in procuring volunteers
- Post your event online at volunteer websites such as VolunteerMatch.Com
- Create a spreadsheet of your volunteers that includes contact data and their potential placements during the event
- Order food and beverage for volunteers during set up and make arrangements for their meals during the event
- If possible, designate one or two tables as Volunteer Tables at the back of the room so your volunteers can sit and watch the program when they are not working at their designated positions
- Have a room or space designated as a rest area for the volunteers. This will be a place where they can stash their purses and coats, as well as eat their snacks and rest their feet. Refreshments for the volunteers should be staged in this room or area
- Create Thank You bags for the volunteers with little treats or t-shirts or branded items. Include collateral material about your nonprofit organization
- Send introductory email to all volunteers to thank them for offering their services. Include complete instructions on parking, dress code, event timeline and any other information of which they should be aware.
- Have one place designated as "Volunteer Command Center" on the day of the event so there is a central location that volunteers can go to with questions or issues. Make sure that there are timelines and Run of Shows available for the volunteers at the command center as well as bandaids, pain relievers, breath mints, safety pins and any other comfort items they may need.
- Create Thank You note to volunteers to send to each of them after the event. If a photo was taken of the entire volunteer group, then include that with the note.



Onsite Coordinator

- Meet with the Venue committee chair and the venue's Banquet manager to go over the timeline and event details
- Ensure that all directions and loading dock instructions have been received from venue and sent to vendors and talent
- In conjunction with the Committee Chairs finalize Run of Show, seating schematics and auction schematics, and the BEO
- Confirm that all green room and break room arrangements have been made with the venue
- Send confirmation of set up and start times to all vendors

- Print all Run of Shows, schematics and seating charts in ample duplicates and bring to venue on the day of the event
- Prepare a tool kit to bring with you on day of event - duct tape, scotch tape, scissors, band aids, pain relievers, breath mints, stapler, pens, sharpies, ribbons, zip ties and any other items you feel could possibly come in handy during the set up
- Pack your event outfit and shoes to be brought with you to venue - you will arrive wearing work clothes for the set up

Speakers and Entertainment

- Work with committee determining type of entertainment and speakers desired (Talent)
- Research Talent within your local area and your budget
- Discuss options for Emcee
- Address Talent's requirements and Green Room needs
- Create Memorandum of Understanding for your event's Talent
- Send deposit to Talent upon receipt of signed MOU
- Meet with Talent (in person if possible) to go over event schedule and goals
- Send Run of Show to Talent for their review
- Make arrangements for all Talent requirements and Green Room needs
- Create personalized Run Of Show for Talent and place in Green Room and at their seating



- Assign a "handler" to manage talent during event
- Purchase gift for Talent and write Thank You note to both Talent and their team

Miscellaneous

- Look into selling tickets through Eventbrite or other online ticketing site
- Partner with local upscale retail store for an in-store party with proceeds going to your event
- Discuss pros and cons of hiring a celebrity
- Discuss pros and cons of including an auto or puppy in your live auction or raffle
- Discuss hosting a VIP pre-party directly before the event for sponsors and large donors