

## 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

| 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 <ul style="list-style-type: none"> <li>Budget Tips and Tricks and Things to Consider: Go to the website</li> </ul>  |             |                 |
| Select Venue <ul style="list-style-type: none"> <li>RFP</li> <li>Contract negotiation</li> <li>Signed Contract</li> </ul>   |             |                 |
| Book Speakers <ul style="list-style-type: none"> <li>Speakers above \$600 require PSC (Link)</li> <li>May book before venue, if speaker is more critical than date or location</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>   |             |                 |

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| <ul style="list-style-type: none"> <li>ensure needs are met</li> <li>• How do you want the tables and chairs?</li> <li>• What facilitation materials are needed?</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   |                    |                        |
| Review Speaker assignments and Needs <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> |                    |                        |
| 2 _____ v Menus and setups – make sure they still work based on current registrations   |                    |                        |
| Monitor and manage registration list <ul style="list-style-type: none"> <li>• Double check to ensure payments have been made</li> <li>• Email billings to balance dues to try to collect all money before event</li> <li>• Cancel duplicates</li> <li>• Answer participant questions</li> </ul>             |                    |                        |
| Start Assembling Materials <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>  |                    |                        |
| Do a final run through of the facility <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>   |                    |                        |

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| 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> |             |                 |

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| 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

| 4 _____   | Target Date | Completion Date |
|---|-------------|-----------------|
| _____ fill 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.  |             |                 |
|   |             |                 |

### Days of Event (especially day 1)

| Item   | Target Date | Completion Date |
|--|-------------|-----------------|
| Unload everything and Check in with hotel/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  |             |                 |

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|---|--|--|
| 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   |             |                 |
| resize 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  |             |                 |

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