**Rotary Event Planning Checklist**

This checklist is designed with a 12-month timetable. If you are on a shorter schedule, just start at the beginning of the list and catch up as quickly as possible. Use the boxes to the left of the items to check off tasks as you complete them.

9 TO 12 MONTHS PRIOR TO EVENT:

☐ Choose an event chair

☐ Choose the date

☐ Determine possible venues

☐ Determine the budget and how it will be managed

☐ Determine the audience

☐ Select members to serve on the committee

☐ Create a binder to store and organize ideas, worksheets, receipts, brochures, etc.

☐ Visit and reserve the venue

☐ Meet with the customer service rep

☐ Start compiling your guest list to estimate head count

☐ Begin planning the program content and presenters

6 TO 9 MONTHS PRIOR:

☐ Hold an introductory committee meeting

☐ Design promotional material

☐ Finalize invitation list

☐ Send Save the Date postcards or emails

☐ Create website content

☐ Create website registration system

☐ Write article for district and club newsletters

☐ Reserve a block of hotel rooms for out-of-town guests (Ask about group rates.)

4 TO 6 MONTHS PRIOR: (Bi-Monthly Meetings)

☐ Open registration

☐ Hold meeting to update status and assign tasks

☐ Send invites, registration forms etc. via email or mail (Include lodging info and maps, as possible.)

2 TO 4 MONTHS PRIOR: (Bi-Monthly Meetings)

☐ Continue to promote event through email and website

☐ Finalize speakers, presenters and program details

☐ Meet with the caterer: menus, wine selections, etc.

☐ Order gifts and award presentations

4 TO 8 WEEKS PRIOR: (Bi-Monthly Meetings)

☐ Send a final reminder postcard

☐ Begin creating the script

2 TO 4 WEEKS PRIOR: (Weekly Meetings)

☐ Work on seating arrangements for the reception

☐ Finalize arrangements for special guests

☐ Confirm details with venue staff vendors

☐ Finalize and order all printing materials

☐ Prepare meeting room assignments and audio/video

1 WEEK PRIOR: (Final Meeting)

☐ Finalize attendee list and report to facility

☐ Finalize program content

THE DAY BEFORE THE EVENT:

☐ Do a final walk through the facility

☐ Confirm all details are complete

☐ Complete an audio/video check

DAY OF THE EVENT:

☐ Set Up Registration Table

☐ Relax and remain calm

☐ Meet with event staff to resolve any issues

WITHIN A WEEK OF THE EVENT:

☐ Hold an event review meeting to improve the next event

☐ Send thank you and acknowledgement notes and

☐ Send a follow up survey to participants, speakers and spouses