

# EVENT PLANNING CHECKLIST

A COMPREHENSIVE PLANNING SHEET FOR TRACKING AND MANAGING YOUR EVENTS FROM INCEPTION TO COMPLETION

## PHASE I: INVESTIGATION

### 1. REQUIREMENT GATHERING

- ❑ Client's goals for event
- ❑ Name/location of venue
- ❑ Time booked in venue
  - *Load-in*
  - *Show*
  - *Load-out*
- ❑ Material needs
- ❑ Drawings & concept sketches
- ❑ Estimated budget from client

### 2. SITE SURVEY - VENUE

- ❑ Preferred vendor list from venue
- ❑ Venue ground plans (and quirks!)
- ❑ Assess & measure load-in pathway
  - *Are there obstacles?*
  - *Will event elements fit through it?*
- ❑ Parking/idling areas for trucking & delivery
- ❑ Locate dead case storage
- ❑ Locate main power panels
- ❑ Check structural or rigging considerations
- ❑ Venue union requirements/agreements

### 3. QUOTE/BUDGET

- ❑ Get current plans from design team
- ❑ Submit equipment needs for bids/pricing
- ❑ Receive bids/pricing estimates
- ❑ Determine labor needs
- ❑ Build quotation budget with deadlines
- ❑ Add additional contingency budget
  - *Generally no less than 20% of quote*
- ❑ Submit quote/budget to client for approval

### 4. CONTRACTS

- ❑ Get approved quote/budget
- ❑ Draft contracts
  - *Double-check event date & time*
  - *Include roles & payment terms*
- ❑ Send contracts for signatures
- ❑ Obtain signed client contracts
- ❑ Send purchase orders & contracts to vendors & contractors
  - *Include roles & payment terms*
- ❑ Send off initial invoice for deposit

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## PHASE II: PLANNING

### 5. PRE-PRODUCTION

- ❑ Apply for/obtain permits & insurance certs.
- ❑ Assign department heads
- ❑ Complete full gear lists
- ❑ Set up vendor accounts
- ❑ Calculate final power requirements
- ❑ Draft final site map
  - *Storage, egress*
  - *Production/Control, cable paths*
- ❑ Book crew/union labor
- ❑ Create trucking schedule & dock assignments
  - *Load-in, load-out*
- ❑ Finalize production schedule
  - *Draft emergency/evac plans, egress*
  - *Communication SOPs, weather markers*
- ❑ Make sanitation plan
  - *Garbage, water, toilets*
- ❑ Book security
  - *Personnel, barricades, police, fire*
- ❑ Book shop prop with department heads
- ❑ Create full strike plan
- ❑ Schedule production meetings
- ❑ Send schedules & docs to all departments

### 6. PAPER & ON-SITE PREP

- ❑ Gather important docs (bring extras!)
  - *Site maps*
  - *Production schedules*
  - *Contact, booking, & crew lists*
  - *Call sheets & time sheets*
- ❑ Gather all gear orders
- ❑ Gather all vendor contracts
- ❑ Gather all production quotes
- ❑ Bring blank employee paperwork & sign in sheets
- ❑ Print out certificates of insurance
- ❑ Gather emergency plans
- ❑ Print out signs and labels
- ❑ Print out all additional job-specific items
- ❑ Build on-site WorkBox
  - *Tools*
  - *Office supplies*
- ❑ Confirm dates & times with venue
- ❑ Confirm crew bookings
- ❑ Confirm vendor deliveries
- ❑ Confirm talent & presenters

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## PHASE III: ON-SITE

### 7. LOAD-IN & BUILD OUT

- ❑ Go to sleep early the night before
- ❑ Arrive on-site early
- ❑ Eat food & drink plenty of water
- ❑ Set up production area
- ❑ Charge phone & computer
- ❑ Tape out floor/areas & put up signs
- ❑ Run crew & dept. head pow-wow
  - *Event goals*
  - *Schedule*
  - *Roles*
  - *Safety rules*
- ❑ Delegate!
- ❑ Stay in one place whenever possible

### 8. EVENT

- ❑ Hurray! The product of your hard work is finally here!
- ❑ Take a breath (if you're lucky)
- ❑ Put on fancy clothes
- ❑ Take a nap! (again, if you're lucky)
- ❑ Final prep for strike

### 9. STRIKE & LOAD-OUT

- ❑ Run crew & dept. head pow-wow
  - *Strike schedule*
  - *Trucking priorities*
  - *Roles*
  - *Safety rules*
- ❑ Watch for safety issues
- ❑ Ensure everything is on schedule
- ❑ Clean & pack up production area
- ❑ Final check in with client

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## PHASE IV: POST EVENT

### 10. RECONCILE & INVOICING

- Gather all receipts
- Gather all final invoices from vendors
- Gather all time sheets
- Submit/process invoices
- Submit/process receipts
- Update budget with actuals
- Inventory resources
- Send final invoices to client
- Check in with department heads
  - *"How did the event go?"*
  - *"How can we improve next time?"*
- Ask for feedback on crew, vendors & management
- Write & send thank you notes
- Write down 3 things to try next time based on feedback
- Update this checklist

### 11. POST MORTEM

- Check in with client
  - *"How did we do?"*
  - *"How can we improve next time?"*
- Check in with vendors
  - *"How do you think things went?"*
  - *"What else would make things run smoother?"*
- Check in with venue
  - *"How did we do?"*
  - *"What else would make things run smoother?"*



**DO IT ALL AGAIN!**