

EVENT ORGANIZATION/PLANNING CHECKLIST

Prepared by Eurasia Partnership Foundation in January 2016

Introduction

Why this checklist has been produced

Organizing an event requires hard work and planning. However, it can be simplified if the whole scenario is divided between players and details. Planning every detail is the most important part of running a successful event. This Task checklist was produced by EPF to assist in efficient organization of all kinds of professional and social events. We are certain it can be also useful to many other organizations, therefore we decided to publish it. It is a step-by-step guidance for an Event Assistant/Program Assistant that will help to provide effective logistical support to personal planning of regular or large scale meetings. It includes description of almost all tasks that need to be accomplished when setting up an event and not only. What is more, it helps not to miss any request, deadline and action no matter how insignificant it seems. The content of this tool is not exhaustive. Depending on the type of the organization and the event, it is expected that every event planner will adapt this algorithm to the particular situation, using only the relevant lines and/or adding new ones. This will help to regularly make events a success.

Who the guide is aimed at

Event Assistants, Program Assistants – new or experienced
Those running large, medium or small scale events
Personnel striving to an effective and easy management of an event.

How to use it

The Guide is easy to use if ticking every line upon finishing the action in the Checklist attached to the Guide.
If necessary consult with the appropriate staff

Event planning checklist

When planning an event						
N	Tick when finished √	Activity	To-do	Point of contact	Deadline	Comments
1		Event Calendar	Conduct and share with everyone as soon as it is changed.	EA	Periodically	
2		Room set-up	Should be set up as required by the PM, PA, etc.	EA with consultation of PMs, PAs ¹	A day prior to an event/meeting	Pay attention to chairs and the scenario of the event. There should not be too many chairs, so that the room is not stuffed. Corridors should be open to reach every point of the room. If people will be filming, their positions should not disturb the event.
3		Directional signage	The event title and the office location sign should be pasted on the specified places.	EA with the help of PAs/PMs	At least 2 hours prior to an event	
4		The building door	Make sure the automatic switch of the building door is working prior to events. Decide if the door should stay open (if too many people are planned to come).	EA	The day prior the event. As well as, at least 30 minutes prior	
5		Event related materials	Ready and placed for sharing.	EA with the help of PAs/PMs	A day prior to the event	Ask PM/PA what other materials should be shared.

¹ EA-Event Assistant, PA-Program Assistant, PM-Program Manager

6		Event related logos, posters and banners	Placed in an appropriate visible place before the event start.	EA with the help of PAs/PMs	A day prior to the event	
7		Sign-in- sheet	Printed and placed close to the entrance. Ask (PM, CEO) and prepare the Memorial Book for VIP invitees to leave a message.	EA with the help of PAs/PMs	A day prior to the event, at least 2 hours prior to an event	All participants of any event should sign the attendance list. Check if they have signed; give the list to those who didn't sign. Afterwards, the list is given to the appropriate project personnel; in the free time, with guidance from project people you include them in the database.
8		Writing materials	Flip charts, pens, pencils, pads as required.	EA	A day prior to an event	
9		Name tags/table tents	Placed at the disposed places.	EA with the help of PAs/PMs	A day prior to an event	
10		All technical equipment tested	Ask the PM or the contact person what they need to set up: <input type="checkbox"/> Laptop <input type="checkbox"/> Projector <input type="checkbox"/> Speakers <input type="checkbox"/> Microphones <input type="checkbox"/> TV <input type="checkbox"/> Lights <input type="checkbox"/> Translation equipment <input type="checkbox"/> Internet quality and accessibility	EA with the help of IT and the Communications team	A day prior	Check a day prior to the event; re-check two hours prior the event. Checking/rechecking means: a) connection via wire, b) material to be presented is put on laptop prior to the event and is visible, c) sounds are heard well as appropriate; d) if the event is filmed, the cameras are in place, connected, and work; batteries are checked, mouse and notepad batteries including; Wi-Fi is checked. If the event is too big, ask the IT M to switch off the guest Wi-Fi. Follow please that the equipment (e.g. projector) does not switch off

						automatically when the event starts; make sure it stays functional all the time as long as needed.
11		Table water	Water in glasses should be available on the table for all presenters during the events.	EA		As needed
12		Photographing	Every event should be photographed (general photo).	EA/PA	Prepare the camera and think about angles a day prior	If the Communications team is not planning to photo or video the event for public presentation purposes, please make sure you make a few photos for the archive, unless the Program says that it should not be done. The camera should be available and working also for other staff to make photos if they decide so.
13		Translation system/ headphones	Should be prepared/ordered in accordance to the number of invitees who may need simultaneous translation.	OM/EA ²	At least 3 days prior to an event	The system should be set up and checked if works at least 2 hours prior the event.
14		Climate control	Should be in a comfortable temperature	EA	At least three hours prior to the event	In the winter it makes sense to switch off for a while half hour after the event starts, to make the space less stuffed. Windows can be opened and closed for the same reason. Make sure open windows do not let in excess noise from the street.
15		Coffee, tea, sugar	Available	EA	Regularly	Let the OM know if the coffee supply is run out

² OM-Office Manager

16		Coffee breaks, meals	Make arrangement for food and refreshment. Ask the Contact Person if there are vegetarians or people with other specific dietary needs.	OM, EA	A day prior to an event	
17		Disposables	If needed	EA- ask OM	Prepared a day prior	
18		Toilets	Check the availability of papers, soap, paper towels prior to an event.	EA	At least 2 hours prior	
19		Garbage	Availability of trash cans	EA	At least 2 hours prior to the event	
20		Re-setup the room	Re-setup the meeting rooms for the next session or to a primal condition. Check to make sure nothing valuable has been left behind, and if so, inform the event Contact person about it. Check if there is no damage, if so, let the event Contact person know about it.	EA	Right after the event	
21		Clean the kitchen	Prepare for the next session or to a primal condition	EA	Right after the event	Dishwashers etc. are available. There is a general office/conference space cleaner available. However, still some cleaning may be required immediately.
22		Remnants of written/print materials used during the event	Hand over to the PA or the PM	EA with the help of PAs or PMs	Right after the event	

23		Go through the checklist to prepare the room for the next session/event	Prepare the room for the next event or set up to a primal condition. Leave the place as good as when you found it.	EA	Right after an event	Apart from general cleaning.
24		Switch on the door alarm	After cleaning the conference room, switch on the alarm system	EA	After the event	If nothing else is expected and you are the last person leaving the space. Otherwise let know the person who stays that the alarm is not on.
25		Presence of the EA during the events/meetings	EA should be available most of the time during small scale meetings in the conference space. Only if s/he is asked not to be present at the meeting should s/he leave. If the meeting does not concern her, s/he should sit in a separate area (even in a closed room, not to hear the conversations) and can work on laptop, but in the conference space.	EA	During the event	It is clear that many small-scale meetings and events happen without sufficient prior notice. However, it is the duty of the event assistant to make sure, as much as she can, if any smaller-scale meetings are planned for that day, and be available for these meetings as much as possible.

Organizing the work

- 1) The Event Assistant should sit with a program team and IT prior to any big event and look through the checklist with them and build a team.
- 2) During an event with presentations Program Managers or guests may need immediate assistance, such as failure of equipment, glass of water, meeting special guest who arrives late or sitting them in the right place, etc. EA or somebody from the team should be available next to them to be able to support such multiple priorities.
- 3) If the conference space is rented by another organization, send thank-you letter for using our facilities and get feedbacks, kindly asking if they have remarks. Respond the letter saying that we will consider their remarks for the next time. Send couple of good pictures (if taken) to them from their event (optional).
- 4) If the event is organized by the organization staff, have a post-event review meeting or discussion with the PM, PA, OA or CEO to find out their remarks. Write down their comments in your Opinion book so you will not lose the valuable information. Re-read it while organizing the next event.
- 5) General distribution materials in the conference room should be well-arranged all the time. They should be visible, easily noticed, and it should be clear that they are for pick up. Five copies per material should be available, if they are taken, new copies should be put in place. Please ask Programs periodically for their distribution materials, in English and Armenian. Please arrange-rearrange them properly. Please encourage visitors to pick them up. Please think about what other distribution materials can be put there.
- 6) Library books should be well-arranged and easy to peruse. If visitors pick up a library book, they can sign a paper and take it for perusal. Please explain to them if you see interest. Please have the library book signing paper ready.
- 7) Keep your own *Arrangement Agenda* based on the Event Agenda to keep everything to run on time.
- 8) The Event Assistant should keep an EVENT LOG (see sample below) and submit monthly and yearly reports to the CFO, FM, OM on all events that have been hold in the CSO meeting spaces.
- 9) **NOTE:** When facilities for PWD will be functioning, new tasks will be added.

<i>Event log sample</i>						
Date	Organized by	Rent paid/AMD	Expenses/AMD	Comments	Contact info	Contact e-mail

Event Checklist Sample

Name of event:

Date of Event:

Time of Event:

Event Coordinator/Contact Person:

Contact Information:

Tick when finished √	Room setup	Comments
	Chairs, tables	
	Event related logos, posters and banners	
	Event related materials	
	Name tags/table tents	
	Sign-in- sheet	
	Memorial message book	
	Flipchart	
	Markers for flipchart	
	Markers for whiteboard	
	Pens	
	Pencils	
	Notepads	

	Scissors	
	Directional signage	
	The building door	
	Equipment	Comments
	Laptop	
	Printer	
	Mouse	
	Hand presenter	
	TV	
	Laptop files/content to be presented	
	Projector video/audio	
	Video camera	
	Audio mixer	
	Wireless microphones/battery/voice	
	Cables	
	Video camera battery	
	Photo camera battery	
	Wireless microphone battery	
	Wi-Fi/ internet	
	Smart board	

	Other preparations	Comments
	Electricity: lights	
	Table water and glasses for presenters	
	Air conditioners	
	Photo cameras	
	Translation system/	
	Headphones	
	Microphones	
	Napkins	
	Hangovers	
	Food	Comments
	Coffee, tea, sugar	
	Coffee breaks, meals	
	Lunch	
	Dinner	
	Disposables	
	Other rooms: Toilet	Comments
	Toilets	
	Towels	
	Soap	
	Garbage	
	Re-setup the room	

	Clean the kitchen	
	Group of written materials used during the event	
	Switch on the door alarm	
	Post event	Comments
	The room re-setup	
	Cleaning	
	Send thank you letter to a renter	
	Post-event discussion with the Event coordinator	
	Report	