Community Activity Planning Checklist

There are many things to keep track of when planning an event. Our Quick Event Checklist and our more Comprehensive Planning Checklist will

QUICK EVENT CHECKLIST

- ☐ Determine objectives – purpose, audience
- ☐ Outline a budget – events and activities should be break-even
- ☐ Logistics – Date, Time, Place, Price
- ☐ Communications – strategy and schedules of communication, social media
- ☐ Have fun!

COMPREHENSIVE PLANNING CHECKLIST

This following comprehensive planning checklist will outline the items to consider including suggested timelines:

3 months before the event

- ☐ Determine objectives, budget, and members of the planning team
  - What do you want to achieve by having this event?
  - Is there a current need or an interest in this type of event?
  - What is the size and scope of the event?
  - Will the ticket cost cover the expenses of the event (ie. cost-recoverable)? If not, will there be funds from another source to cover the expenses?
  - Do you have enough interested members on your planning team? Assign tasks and responsibilities to each member.

8 – 10 weeks before the event

☐ Logistics

- Date and Time: Consider the target audience, other events happening around the same day, and major holidays;
- Location: Consider your budget, projected attendance, and space requirements (ie. room capacity, AV requirements); is the venue available for the date you require?
- Budget: Accurate estimates minimize any surprises. Consider costs related to rental costs, food and beverage, audio visual, taxes and gratuities, insurance needs, speaker costs (ie. travel and lodging, meals, transportation), and other miscellaneous charges (ie. materials and supplies, signage, etc);
- Speaker: Do you require the assistance of your Alumni Communities representative in securing your speaker (if applicable)? Is the speaker available for the required date?

☐ Marketing and Promotion

- Marketing strategy: Is there a theme? What are the logos, images and pictures that need to be incorporated?
- Marketing tools: Will you be using McGill's e-broadcast system? Social media? Or both?
- Distribution: How many e-broadcasts will be sent out to the target audience? How far in advance will you need to start promotion?

7 – 8 weeks before the event

☐ Logistics

- Venue and Caterer: Confirm and secure the details with the venue and caterer;
- Budget: Issue any deposits required to secure venue; if the event is not cost-recoverable, has the required additional funding been secured?
- Speaker: Book speaker's travel arrangements (with help from your Alumni Communities representative);

- ☐ Marketing and Promotion
  - Draft your event listing and map out your schedule of e-broadcasts, using the **Volunteer Event Management Form** at https://www.alumni.mcgill.ca/broadcast;
  - Schedule the Social Media posts;

6 – 7 weeks before the event

- ☐ Marketing and Promotion
  - **First** promotion of your event on e-broadcast system and social media;

4 – 6 weeks before the event

- ☐ Logistics
  - Order of Proceedings: Draft a **preliminary** schedule of how the event will run on the day; breaking it down in 15 minute intervals, and identify who should be where;
  - Volunteers: Review volunteer requirements and recruit additional volunteers, as required;
  - Budget: Review budget estimates, and determine if estimates are still accurate;
  - Supplies: Request McGill memorabilia or additional materials from your Alumni Communities representative;

- ☐ Planning Team
  - Check in: Are members of the planning team performing their assigned tasks and responsibilities? Do they require support on their tasks?
  - Goals and Objectives: Is this event still meeting the goals and objectives set out at the start? Have these goals and objectives changed? Do the event details need to be realigned to meet these new goals and objectives?

2 – 4 weeks before the event

☐ Logistics

- Speaker: Review AV requirements or special needs with the speaker;
- Registration numbers: Review registration numbers to date; are the numbers meeting the targets? If higher or lower than expected, logistical and/or marketing and promotional arrangements may need to be adjusted;

2 weeks before the event

☐ Logistics

- Order of Proceedings: Prepare **final** schedule of how the event will run on the day; breaking it down in 15 minute intervals, and identify who should be where;
- Check in: With venue, caterer, AV, speakers, and volunteers to confirm the event details.
- Registration numbers: Review registration numbers to date; adjust logistics as required;

☐ Planning Team

- Check in: To discuss and finalize details;

1 week before the event

☐ Logistics

- Reminders: Send out reminders to registered guests;
- Supplies: Prepare and purchase supplies for the event (ie. nametags, signage, memorabilia, Thank You gifts, etc);
- Final numbers: Notify venue and caterer of final registration numbers;

Day of the event

- □ Logistics
  - Arrive early and double check details (ie. food requirements, AV equipment, signage, number of chairs, etc);
  - Know your Order of Proceedings and the program for the event;
  - Greet your volunteers and thank them for their contribution; make sure they're in place as guests arrive;
  - Greet your guests and thank them for coming;
  - Clean up – Take down signage, pack up remaining supplies;

Following the event

- □ Debrief
  - Meet with the Planning Team to discuss the target goals and objectives, and decide whether they were met; what were the successes, challenges, and recommendations for future events; review any surveys sent out to attendees;
  - Pay any outstanding invoices;
  - Present the Final budget on the event;
  - Send the final attendance list to your Alumni Communities representative;
  - Send Thank You notes to all your volunteers and the speaker.