

Event Management Checklist

15 Weeks Prior

| Task | Comments | Completed |
|---|--|-----------|
| Determine goals and purpose of event | <ul style="list-style-type: none"> Who is your target audience for the event? What are your learning objectives, if applicable? What are your key messages? What do you hope to accomplish? How will you gauge effectiveness? How does this event complement the Strategic Plan? | |
| Select date and time | <ul style="list-style-type: none"> Ensure hosts, VIPs, and/or speakers are available for specified dates (work via admin. assistants with the church office administrative assistants) Determine if VIP's spouse will be invited and ensure they can attend Consult church calendar/religious calendars when selecting Think of church culture/workday schedule of church staff/ availability of members | |
| Set budget | <ul style="list-style-type: none"> Obtain approval of request for funds from church leadership (Executive Pastor) Research potential funding sources such as partnering with other ministries; soliciting businesses; fundraisers Include all projected expenses in budget request Determine if any fees will be paid by attendees Complete budget request form | |
| Select and reserve venue | <p>Remember to review:</p> <ul style="list-style-type: none"> Will event be at Woodstream or another site? A/V capabilities Parking availability/restrictions Maximum capacity Other events occurring near space – will they conflict? Accessibility – how will persons with disabilities enter the venue? Access time to space Load-in/delivery capabilities Included equipment with room rental Surrounding sound impediments Security issues | |
| Schedule rain plan, if applicable | <ul style="list-style-type: none"> Select venue Determine who will make the rain plan call and when you will make your final decision Speak with vendors about refund and cancellation policy costs and deadlines Determine how and when you will communicate the rain location to your guests Consider additional needs such as different staff, rental equipment, etc. | |
| Determine guest list | <ul style="list-style-type: none"> Consider your target audience and key messages When possible, research similar past events to determine participation rate. | |
| Ensure inclusivity, accessibility, and sustainability | <ul style="list-style-type: none"> Consult with the ADA's guide on temporary events Review emergency guidelines for health, building or security incidents | |

Woodstream Church

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| Investigate needs for special permits, licenses, insurance, etc. | <ul style="list-style-type: none"> Consult with Executive Pastor for any special permits, licenses, insurance, etc. needs | |
| Research potential vendors | <ul style="list-style-type: none"> Use only licensed approved caterers or vendors Refer all policies regarding contracts, procurement, and RFPs to Executive Pastor for review | |
| Develop a production schedule for any design elements | <ul style="list-style-type: none"> Include items like your program, flyers, website graphics, and signage Determine deadlines to send items to printers to receive materials on time | |
| Determine meeting schedule for your committee | <ul style="list-style-type: none"> Create a reoccurring calendar appointment | |

12 Weeks Prior

| Task | Comments | Completed |
|---|--|-----------|
| Develop a communications plan | <ul style="list-style-type: none"> What is your event's main message? What media (webpage, flyers, email, church announcements, etc.) reaches your target audience? Determine when the best time is to send messages. Consult with Events/Hospitality Ministry for advice and inspiration. | |
| Update any website material | <ul style="list-style-type: none"> Make request to IT manager to post web announcement; send church-wide email Include common guest questions such as parking, dress code, and program schedule Ensure website announcements have links for registration. | |
| Contact (or schedule) Security | <ul style="list-style-type: none"> Complete security request and parking request forms | |
| Add event to the church calendar and discuss other internal promotion opportunities | <ul style="list-style-type: none"> Request other ministry leaders distribute flyers and announce to their team members | |
| Contact Security about parking | <ul style="list-style-type: none"> Review information about parking daytime and overnight | |
| Determine if you will live stream your event | <ul style="list-style-type: none"> Who is coordinating? Where will the webcast run on the website? Who will write a copy for the site? When will the site go live? How will you communicate the webcast to your guests/audience? Where will the video be archived afterward? Who will caption the stream live? Can you run analytics afterward? If so, do it for assessment purposes | |
| Schedule photographer, if needed | <ul style="list-style-type: none"> Budget for a photographer and developing printed pictures | |
| Schedule videographer, if needed | <ul style="list-style-type: none"> Budget for videographer and developing recording | |
| Select designer/printer | <ul style="list-style-type: none"> Budget for designer/printer and developing printed media | |
| Order/design save-the-date cards or emails | <ul style="list-style-type: none"> Budget for printed materials | |
| Secure mailing house if you are to send out save-the-dates | <ul style="list-style-type: none"> Obtain permission from executive pastor for mass mailing postage | |
| Begin researching travel arrangements and hotel options | <ul style="list-style-type: none"> Budget for lodging and travel for VIP guests | |
| Schedule meeting with Event/Planning Committee | | |

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10 Weeks Prior

| Task | Comments | Completed |
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| Reserve hotel, plane, and travel accommodations for speakers/VIPs and staff, if applicable | <ul style="list-style-type: none"> Consider requesting a hotel block if a large portion of your attendees are traveling outside of the local area to attend the event | |
| Secure A/V needs for event | <ul style="list-style-type: none"> Lighting Supplemental video needs Sound – Ensure you have wireless advancer, if using ppt and LCD projector/screen Coordinate additional mics in the audience for any Q&A needs Ensure you have on-site A/V tech for event Confidence monitors for speakers | |
| Design and create/order invitations | <ul style="list-style-type: none"> Confirm a way to ask guests about any accommodation requests such as ADA access or dietary needs | |
| Select & book caterer | <ul style="list-style-type: none"> Do any of your guests have dietary restrictions? Remember vegetarian options Determine VIP's food and beverage preferences Will you need linens from the caterer or other rental company? Remember waters for the podium and/or bottled for guests, if applicable Gain approval from church leadership of caterer | |
| Secure entertainment/musicians | <ul style="list-style-type: none"> Budget for musicians and singers Think about all aspects of the event (guest arrival, duration of event, etc.) | |
| Begin designing printed pieces (i.e. invitations, tickets, flyers, programs, pamphlets, out-of-town guest booklets, etc.) | | |
| Develop press release and calendar listings | <ul style="list-style-type: none"> Consult with church administrative assistant for tips and recommendations | |
| Request and receive speakers'/VIPs' bios | <ul style="list-style-type: none"> Ask for photo if included in program – high resolution jpeg | |
| Send save-the-dates | | |
| Order plants/flowers | <ul style="list-style-type: none"> Remember rental plants for staging and all floral needs Budget for live or artificial plants/flowers | |
| Schedule President's Podium | <ul style="list-style-type: none"> For official Institute events, use President's podium – Brandon Ford | |
| Coordinate meeting with security | <ul style="list-style-type: none"> Complete security request form | |
| Schedule supplemental staffing | <ul style="list-style-type: none"> Ushers, crowd management, etc. | |
| Send preliminary volunteer requests | <ul style="list-style-type: none"> Youth are great resources | |
| Request participation of additional speakers | <ul style="list-style-type: none"> Emcees, presenters, etc. Always have someone introduce the President or other VIP | |
| Order additional décor materials | <ul style="list-style-type: none"> Determine from event/planning team what décor is already owned by the church Flowers Balloons Pipe and drape | |

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| Reserve additional set-up materials | <ul style="list-style-type: none"> • Rental chairs • Stage • Podiums • Tables • Easels • Coat rack • Heat lamps | |
| Complete/submit Event Details | <ul style="list-style-type: none"> • Send to Executive Pastor and Events/Hospitality Ministry. Due no later than 5 weeks out | |

8 Weeks Prior

| Task | Comments | Completed |
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| Review printed materials with your designer | | |
| Set menu with caterer – know that you can confirm the final head count closer to the event | | |
| Secure permits and insurance | | |
| Determine if gifts, awards, etc. will be given and research companies | | |
| Release press announcements to national and local print media | <ul style="list-style-type: none"> • Work with Executive Pastor to obtain approval of a press release | |
| Order any giveaways | <ul style="list-style-type: none"> • Consider partnering with other ministries to share costs • Do not include a date, if possible, so items can be reused | |
| Arrange for transportation (buses, shuttles) if necessary | <ul style="list-style-type: none"> • Consult with event planning team for resources | |
| Determine parking for visitors | <ul style="list-style-type: none"> • Make arrangements through church security | |
| Confirm accessibility resources | <ul style="list-style-type: none"> • CART Transcription • ASL Interpreter • Ensure you have an operational plan in place for assisting those with disabilities and that volunteers are fully briefed on plan for assistance | |
| Order speakers' gifts | | |
| Request other ministry support | <ul style="list-style-type: none"> • Musicians • Singers • Nursery • Ushers • Deacons/Minister/Pastor | |
| Begin editing printed programs/materials | | |
| Schedule A/V run-through the day before the event | <ul style="list-style-type: none"> • Schedule speakers/musicians and others to participate (if live streaming or captioning, include those individuals, as well as any social media testing, i.e. Microsoft Teams Live) | |

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6 Weeks Prior

| Task | Comments | Completed |
|---|--|-----------|
| Assemble/address invitations | | |
| Create RSVP tracking system | <ul style="list-style-type: none"> Confirm a way to ask guests about any accommodation requests such as ADA access or dietary needs | |
| Mail invitations | <ul style="list-style-type: none"> Set RSVP 1.5-2 weeks (at minimum 1 week) prior to event date Update website with RSVP information | |
| Order awards, gifts, certificates, etc. | | |
| Distribute flyers/emails advertising event | | |
| Finalize transportation logistics for VIPs and out-of-town guests | | |
| Release press announcements to local TV, radio media | <ul style="list-style-type: none"> Identify media that will release announcements of events for free | |
| Hold walk-through with major stakeholders/committee members to ensure all needs are met | | |
| Secure musicians/entertainers | <ul style="list-style-type: none"> Determine if any sound checks are necessary | |
| Purchase all needed decorations | <ul style="list-style-type: none"> Budget for decorations | |
| Begin making decorations, if need be | | |
| Determine trash collection sites | <ul style="list-style-type: none"> Notify the church facilities manager of the number of trash receptacles and recycle bins that are needed for the event | |
| Determine recycle bins | | |
| Design assessment tool for event | <ul style="list-style-type: none"> Determine when (during event or after event) assessment tool will be distributed to attendees | |

4 Weeks Prior

| Task | Comments | Completed |
|---|--|-----------|
| Make a safety and emergency preparedness plan | <ul style="list-style-type: none"> Identify who will be on duty for health emergencies, facilities and security during the event | |
| Place local print ads and watch for media hits | | |
| Confirm staff/volunteers for each aspect of the event | <ul style="list-style-type: none"> Distribute a volunteer assignment list for event | |
| Make parking and directional signs that can be created in-house | | |
| Create welcome packets/materials for attendees | | |
| Create script for yourself or for VIPs/presenters | <ul style="list-style-type: none"> Work with Pastor's administrative assistant to provide talking points for pastor, etc. Clearly mark each speaker change with dividers in the script book Request scripts from all participants with a talking role to create a complete script book and ensure that speakers are not redundant Include phonetic spellings for any individuals' names that might be difficult to pronounce | |
| Confirm all travel arrangements | | |
| Confirm security needs and plan walk-through of site with them | | |

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| Coordinate with church administrative assistant on when contracted services will be paid (in most cases, after services are rendered) | | |
| Schedule volunteer training | <ul style="list-style-type: none"> Write description of duties for each volunteer | |

2 – 1 Week(s) Prior

| Task | Comments | Completed |
|---|---|-----------|
| Follow-up with RSVP list – make personalized phone calls & emails, if necessary | | |
| Send final numbers to the caterer | | |
| Confirm participation with all VIPs/presenters. Send them updated event details, run of show, and talking points. | | |
| Create seating plans and room diagrams for assistance with set-up and day-of-event questions | <ul style="list-style-type: none"> Ensure you follow the correct protocol for head table seating Create place cards for seated, if needed Ensure you have back-up seating options available for changes within head table seating arrangements | |
| Develop photo shoot list | <ul style="list-style-type: none"> Identify a photographer Add the cost of photographer and developing of pictures in budget | |
| Hold pre-event meeting with all significant stakeholders (vendors, managers of venue, key committee members and volunteers, etc.) | <ul style="list-style-type: none"> Provide description of duties for each volunteer | |
| Do one last walk-through of venue | | |
| Hold training session with volunteers | | |
| Ensure all printed materials/collaterals are assembled and correct | | |
| Make follow-up calls to media | | |
| Make nametags/lanyards for attendees and extra plain ones for surprise guests | <ul style="list-style-type: none"> Suggest magnetic/reusable with clip tags for those who are unable to use magnetic If disposable, suggest Avery 8395 Preferred template – Arial Bold, first name centered 54 pt; last name underneath in 48 pt Create two nametags for name variations (i.e. Joseph and Joe) Consider purchasing machine for onsite nametags | |
| Create “Event Day Survival Kit” full of needed items: pens, sharpies, tape, scissors, etc. | | |
| Create detailed hour-by-hour event agenda (event plan) for key volunteers/vendors and distribute to them | | |
| Confirm set-up/breakdown with all vendors | | |
| Send final information to participants, including directions, maps, last-minute details, etc. | | |

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| Create volunteer sign-in form | | |
| Wrap gifts | | |
| Distribute parking passes | | |
| Send completed Run of Show and RSVP list to VIPs | | |

1-2 Days Prior

| Task | Comments | Completed |
|---|--|-----------|
| Create a final to-do list to determine all tasks are complete | | |
| Ensure all appropriate contacts' information is listed where you can easily retrieve it | <ul style="list-style-type: none"> Recommend they are added to your phone for easy texting capabilities on event day | |
| Purchase floral arrangements if not provided by vendor | | |
| Recheck all equipment/materials to ensure nothing is damaged, quantity is correct, etc. | | |
| Reconfirm schedule with caterer | | |
| Set-up registration area, if possible, so you are prepared for the next day | | |
| Decorate room if you can | | |
| Display parking/directional signs | | |
| Gather all needed materials (name badge, notebook, etc.) | | |
| Deliver materials/equipment to venue site | | |
| Test webstreaming | | |
| Be prepared to troubleshoot changes day-of | <ul style="list-style-type: none"> i.e. bring along a three-hole punch so the Pastor can input his revised script day-of, have extra chairs backstage in the event another VIP is asked to join the stage party, etc. | |
| Discuss rain plan logistics | | |

Day of Event

| Task | Comments | Completed |
|---|--|-----------|
| Arrive early and do one last walk-through | | |
| Oversee vendor set-up | | |
| Ensure all VIP materials are correctly labeled and in place | <ul style="list-style-type: none"> Provide a program to Pastor and VIPs so they know speaking order | |
| Check all set-ups | | |
| Ensure waters are in podium | | |

Up to a Week After Event

| Task | Comments | Completed |
|--|----------|-----------|
| Send thank you notes | | |
| Submit invoices and receipts | | |
| Hold post-event meeting with key players | | |
| Send pictures/mementos to VIP guests | | |
| Pack up and inventory all materials | | |
| Update website | | |
| Book next year's venue for annual event | | |
| Rate caterer's performance on evaluation of event | | |
| Review evaluations of attendees and share results with event planning ministry and members of the host event team. | | |