

Sample Planning Timeline

This timeline represents best case scenario, and can be shortened depending on the needs and complexity of your event

4-6 months out:

- Determine committee members
- Define event scope and objectives
- Determine schedule for event
- Build your budget
- Determine registration fees (if any)
- Identify and secure your venue
- Place a hotel room block if your event requires overnight lodging
- Plan food and beverage if applicable (can be done closer to the event if you're not doing venue catering)
- Identify and begin reaching out to speakers/exhibitors (start with keynote/anyone who will need to travel)
- Begin designing marketing materials (posters, postcards, event logo, etc.)
- Create/update event website if applicable
- Determine and order event giveaways (if possible, better pricing if you order far enough in advance)
- Send save the date to past attendees

2-3 months out:

- Continue reaching out to and confirming speakers/exhibitors
- Define staff/volunteer roles and recruit staff and volunteers to help day of event
- Reach out to elected officials about attending to gauge initial interest (often they won't be able to fully commit until a few weeks out)
- Build registration system
- Finalize marketing materials (posters, postcards, event logo, one pager for schools, etc.)
- Open registration system and invite attendees (if you're holding for a school notify teachers and confirm there are no schedule conflicts, if you're inviting an external audience open registration and start to advertise)
- Book photographer/videographer if using

1-2 months out:

- Confirm speaker details (titles, workshop description, a/v and set-up needs, presentation time, etc.)
- Begin confirming details with venue (A/V, catering, certificate of insurance, etc.)
- Finalize event program
- Finalize day of event staffing/volunteers
- Develop materials (e.g. PowerPoints for internal speakers, handouts, etc.)



- Confirm elected officials
- Draft pre- and post-event emails
- Create event evaluations
- Continue marketing push to attract attendees
- Make a plan for any checks or payments you'll need day of event

2 weeks out:

- Send details and reminder emails to presenters, staff/volunteers, attendees with times, parking, directions, etc.
- Collect PowerPoints and resources from speakers to upload to your website
- Get venue preliminary numbers
- Begin staging materials and supplies
- Finalize and print signage
- Design nametags
- Prepare attendee folders
- Assemble staff/volunteer packets
- Continue marketing push

1 week out:

- If possible, do pre-event run through with event staff and volunteers
- Make sure you have any checks/payments you'll need for day of event
- Continue marketing push

Several days out:

- Close registration (update event website to reflect this and note if walk-ins will be accepted)
- Get venue final meal counts
- Print nametags
- Send final reminder email to presenters, staff/volunteers, attendees
- Create a folder for yourself (printed and/or on your laptop) with all lists and files you will need for day of event
- Final marketing push if walk-ins are accepted

Day before:

- Load up materials and supplies
- Stage and begin setting up venue if possible

Day of event:

- Set up
- Check in and orient staff and volunteers
- Welcome exhibitors/presenters and help them find their space/get set up
- Register/check-in attendees
- Answer questions, put out fires, oversee staff/volunteers
- Roam around and engage attendees who look lost or uncertain of what to do
- If attendees are moving between spaces, ensure you have adequate signage or volunteers stationed to help provide directions
- Take photos
- Clean up, pack out, head home, relax!

Post event:

- Send post event thank you and survey to presenters, staff/volunteers, attendees
- Review and pay any remaining bills
- Debrief with committee and make notes of changes for next year
- Create event recap with attendance and survey data to share with presenters and staff/volunteers
- Reinforce learning outcomes with exploration in class, job shadows, or other activities
- Begin planning for next year!