**Del Mar Heights PTA Event Planning Checklist**

The following checklist is provided as a general guideline for event/activity planning. It is not intended to be an “all inclusive” checklist for your specific committee. Contact the PTA Board member overseeing your event if you have any concerns or questions.

Event Information:

Chairperson Contact Information

Activity Date

Location Time

Check when Completed

* Review notes/minutes/suggestions from prior year’s event
* Activities in compliance with PTA guidelines and insurance
* Applications and Permits
* Date, time and location compatible with school’s master calendar
* Principal approval required? Check with President
* Complete school facilities usage permit form
* Changes to Budget to be approved by PTA Executive Board
* All Committee planning meeting minutes forwarded to PTA president
  + Meeting immediately following event/program for final report
* Volunteer scheduled and confirmed
  + MySchoolAnywhere sign-up sheet
  + Follow-up with volunteers with instructions for event
* Communication/Publicity Materials
  + PTA website posting (landing page)
  + Weekly Blast
  + All call/ email to parents/room moms
  + School banners and other signage
  + School Bulletin Board
  + Communications VP for press releases
  + School Marquee posting
* Special Requirements
  + Custodian
  + After office hours
  + Tables/chairs
  + Audio. Visual and other equipment
  + Paypal button/swipers
  + Registration and Check-in Process
* Accounting
  + Deposit to treasurer
  + Donations acknowledged
  + PTA committee report to Treasurer for final accounting

**Some extra planning tips:**

**High Level Planning: 6-9 Months Ahead of Event \***

* Establish event goals and objectives
* Select date
* Identify venue and negotiate details
* Develop Event Master Plan
* Get cost estimates *(e.g., room rental, food & beverages, equipment, speaker fees, travel, etc.)* and create a budget
* Recruit event committee,  event manager or chair and establish sub-committee chairs
* Create and launch publicity plan & brand your event *(ensure staff and/or volunteers are identified to manage specific tasks – e.g., media relations, VIP coordination, printed material design & printing coordination, signage, online /social media, etc.)*
* Identify and confirm speakers/presenters/entertainers
* Identify and contact sponsors/partners

***\*start your planning as early as possible.***

**6-4 Months Ahead of Event**

* Speaker/presenter/entertainer liaison: e.g.:
* finalize presentation/speech topics
* get bio information, photo
* travel & accommodation arrangements
* have contracts signed if appropriate, etc.
* Financial/Administration: for example, determine:
* Registration fees
* Set up/enable online registration
* Sponsor levels/amounts
* Identify items to be underwritten and accounting tracking details
* Venue/logistics planning, e.g.:
* Investigate need for any special permits, licenses, insurance, etc.
* Determine and arrange all details re menu, A/V equipment, registration set-up, parking, signage, etc.
* Review security needs/plan for the event with venue manager
* Publicity:  Follow publicity plan, e.g.,
* Develop draft program
* Create draft event script (e.g., MC, speaker introductions, thanks, closing, etc.)
* Develop publicity pieces -- *e.g., newsletter articles and/or ads, radio spots, print blog posts articles for submission to other publications and/or ads, etc.*
* Request logos from corporate sponsors for online and printed materials
* Develop and produce invitations, programs, posters, tickets, etc.
* Develop media list & prepare News Release, Media Advisory, Backgrounder and all media kit materials (e.g., speaker info, photos, etc.)
* Create event page on your website
* Enable/create email event notifications
* Create a Facebook event page
* Develop a promo video and post on YouTube and your Facebook page
* Register your event on a variety of online event calendars
* Create some buzz on your blog or member forums
* Determine VIPs and create invitation & tracking document (e.g., spreadsheet)

**1-2 months prior to event**

* Send reminders to contact list re registration/participation
* Presenters/Speakers/entertainer: e.g.:
* Confirm travel/accommodation details
* Request copy of speeches and/or presentations
* Sponsorship: Follow up to confirm sponsorships and underwriting
* Publicity:
* Release press announcements about keynote speakers, celebrities, VIPs attending, honourees, etc.
* Post your initial event news release on your website and circulate to all partners, affiliated organizations, etc.

**1 week ahead**

* Have all committee chairs meet and confirm all details against Master Plan – and ensure back-up plans are developed for any situation (e.g., back-up volunteers as VIP greeters, additional volunteers for registration or set-up, etc.)
* Finalize event script
* Brief any/all hosts, greeters, volunteers about their event duties and timelines
* Final seating plan, place cards, etc.
* Provide final registration numbers to caterer
* Make print and online copies of any speeches, videos, presentations, etc.
* Final registration check, name badges & registration list
* Determine photo op and interview opportunities with any presenters, VIPs etc. and confirm details with interviewee and media

**1 day ahead**

* Confirm media attending
* Ensure all signage is in place
* Ensure registration and media tables are prepared and stocked with necessary items (e.g., blank name badges, paper, pens, tape, stapler, etc.)
* Ensure all promo items, gifts, plaques, trophies, etc. are on-site

**Event day**

* Ensure you have copies of all instructions, directions, phone numbers, keys, extra parking permits for VIP guests, seating charts and guest lists with you
* Check-in with each Committee Chair to ensure their team is on track

**Immediately following event**

While you need to conduct a thorough evaluation and update your budget, there are post-event publicity, fundraising and member development opportunities that you can take advantage of with just a little pre-event planning. Here are some of the activities you might consider once the event is over:

* Financial status: gather all receipts, documentation, final registration data, etc. and update budget
* Send thank-you’s and acknowledgement letters to:
* Sponsors
* Volunteers
* Speakers/presenters
* Donors
* the Media

*In your thank-you notes, be sure to remind the recipients of the event’s success – and how they contributed (e.g., dollars raised, awareness - number of participants, etc.).*

* Post-event publicity – see publicity section that follows
* Conduct a Post-Event Survey – to learn what people enjoyed about your event, and where you have room to improve.
* Follow-up Communication with Event Participants
* Reach out to event participants – thank them for participating and promote your ongoing programs and how they can support you throughout the year by joining, volunteering or making a sustaining donation.
* Conduct a thorough evaluation