

Events Checklist

The following guides are provided to help plan, promote and hold successful events, to increase CAB's visibility, to build and retain membership, and to make it possible for newer members to be involved in leading an event or program. It is suggested that a checklist be copied and provided to each committee member at the first planning meeting.

Preliminary Information:

- ☐ Establish committee chair and members; assign individual responsibilities for action items
- ☐ Establish date of event
- ☐ Establish and confirm location
- ☐ Establish "theme" for event
- ☐ Identify mistress of ceremonies, identify CAB leaders who will speak and who will introduce the keynote speaker and other individuals who need introduction
- ☐ Define "overview" for event (paragraph to be used for quick promotion and definition)
- ☐ Outline intended program outcomes and target audience
- ☐ Establish schedule for activities to be completed and for subsequent meetings

Budget Considerations:

Establishing a budget well in advance of a program or event is critical for its success. Clarification about events' goals should be established; an event can be a fund-raiser or promotional with no or minimal profit expected. Consider offering a reduction for early ticket purchasers, members, students, or a "targeted" audience.

Income:

- ☐ Admission Tickets
- ☐ Business or Corp. Sponsors
- ☐ Grants
- ☐ In-kind donations
- ☐ Advertising
- ☐ Exhibits
- ☐ Raffle Tickets
- ☐ Auction

Expenses:

- ☐ Food & Beverage (include gratuities & tax)
- ☐ Hotel room(s)
- ☐ Transportation
- ☐ Exhibit space
- ☐ Registration (forms, name badges)
- ☐ Change for cash payments
- ☐ Audio/Visual, easel and paper
- ☐ Printing
- ☐ Advertising
- ☐ BPW Foundation publications
- ☐ Postage
- ☐ Certificates, plaques, gifts, door prizes



Keynote Speaker(s):

- _____ Determine if a keynote speaker or presenter is needed
- _____ Contact speaker to establish availability
- _____ Send confirmation letter, fax or e-mail to keynote speaker or presenter; define fees and/or expenses to be covered along with procedures; provide date and time of presentation, location, topic, length of presentation, attendee profile and theme of meeting or program
- _____ Establish special needs of speaker/presenter (i.e., visual, copying, microphone, arrangement of room, paper, pens). Advise her/him of the deadline by which this information is needed.
- _____ Communicate with speaker prior to the event to ensure needs are met

Flyers/Invitations/Letters/Tickets:

Note: When sending a letter of invitation, press releases, or a request for a message to an elected official or when requesting corporate sponsors, it is a good idea to include a CAB Fact Sheet. Also consider having a letter or request signed or co-signed by a CAB member who may be familiar with an official or business; it may precipitate a favorable response more quickly. Include a name and telephone number for contact information and registration.

- _____ Generate list of dignitaries, guests, businesses or corporate sponsors to be invited
- _____ Consider inviting state and local officials, and community leaders
- _____ Consider inviting former CAB members.
- _____ Establish a list of individuals who will receive free admission (Candidates seeking office, except at the highest level, generally pay admission for the opportunity to attend a gathering)
- _____ Distribute flyer or letters to businesses and associations, members, and anyone who can help promote the event; post flyers on bulletin boards
- _____ Print tickets or registration forms for advance sale (distribute to members and urge members to sell tickets or registrations in advance; make registration easy)
- _____ Communicate with members about ticket sales and the need to promote the event
- _____ Establish who will send letters of thanks and appreciation; ensure that they are sent

Special Considerations:

- _____ Have a guest book or registration sheet available (important for follow-up with prospective members)
- _____ Identify members who will serve as greeters (team newer members with knowledgeable members)
- _____ Identify members who will serve as ticket and money takers
- _____ Have name tags available (consider identifying CAB members on name tags)
- _____ Have a member assigned to prepare a list of dignitaries and special guests to be introduced at the event
- _____ Have basic supplies available (pens, staples and remover, clips, scissors, etc.)
- _____ Ensure membership application forms and information are available
- _____ Plan room or table setups
- _____ Check facility early on to determine if a public address system or other accommodations such as registration table(s) are available. Rent or borrow if needed.



- _____ Have CAB Fact Sheet and related information available
- _____ Have Organization Schedule of upcoming meetings and events available; ensure it includes a contact member name, telephone number or e-mail
- _____ Prepare Program for event (list names and telephone numbers of officers and/or committee chairs, and acknowledge donors, contributors, committee chair(s) and members, and those deserving recognition
- _____ Prepare certificates of appreciation or recognition to speakers, contributors, participants, etc.
- _____ Determine if door prizes will be given (members and businesses are good sources). Have something available to serve as an entry (business cards or admission tickets work) and a container in which to put them
- _____ Arrange for a photographer, even if the media will be present
- _____ Schedule a post event evaluation and notes for future reference; collect materials for future use

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