

EVENT ORGANISATION CHECKLIST



This list is not prescriptive and should not deter potential event organisers; it is meant as a helpful *aide memoire*, to help us all ensure nothing gets forgotten or efforts duplicated.

The checklist can be completed electronically – or printed out, referred to and sections ticked off as they are completed.

Some of the items will not apply to every event; others may need to be added that are specific to your particular event. **Feel free to edit this document.** The aim is to complement the communications schedule produced by Neil as Webmaster. (*see also below*)

If using the list electronically, you may wish to copy/paste this symbol in the 'completed?' column ✓

DATE for COMPLETION	PERSON RESPONSIBLE	TASK	NOTES/DETAILS CONFIRMED	COMPLETED?
THE INITIAL IDEA/PROPOSAL				
		Raise awareness/get approval from all YAHR committee		
		Check with Chair, Events and Venues Co-ordinator, Secretary, Webmaster,		
		Check: a) Title b) Proposed date(s) c) Aimed at d) Synopsis e) Finances: costs of venue hire, travelling etc (free/participants paying?)		
		Create a CONTACTS LIST OF ALL INVOLVED.		
VENUE BOOKING				
		a) Liaise with Venues Co-ordinator		

		b) Venue Booked		
		c) Capacity required.		
		d) Layout requirements (theatre/cafeteria style?)		
		e) Registration table near the door. Coat hooks?		
		f) Access/Toilets		
		g) Catering (drinks on arrival/Lunch/Special requirements)		
		h) Date for numbers for catering		
		i) AV facilities (WiFi. Projector, Connectors, screen etc) Person to help on the day?		
		j) Access and facilities for those with Special Needs (Learning or Mobility		
		k) Hearing Loop System?		
		l) Microphones?		
		m) Costs – Venue + catering. pro-rata or a set fee? Cancellation fee?		
		n) YAHR Signage to venue (venue-specific or generic YAHR – <i>see separate file</i>)		
		o) Access by public transport and parking		
		p) Prepare directions to venue and attach map if possible		
		q) Check Booking Conditions and keep a copy		
		r) Other? – an specific to this event?		
CONTRIBUTORS/PRESENTERS				
		Contact all – check all are available on agreed date.		
		Explain aims, give idea of time for presentation, methodology (lecture/interactive/Q&As), AV available for them		
		Consider having an assistant to deal with all AV matters, in advance and on the day		
		Discuss any costs involved (Travel expenses, fees?, printing etc)		
		Explain how to claim expenses and when		
		What are their AV requirements? Do they need help? Date for e-mailing to AV co-ordinator?		
		Keep in touch with all presenters about the agenda. Send them first draft as consultation and expect iterations before it is finalised.		
YAHR COMMUNICATIONS AND ADMIN				
		ADVANCE/INITIAL NOTICE – once the idea has approval, then brief information (date, title, venue) can be included in e-mails, the Bulletin and on the website		

		FLYER - Using YAHR template , draft the flyer and circulate to Events and Venues Co-ordinator and WebMaster		
		Be prepared to revise/consult/re-edit and re-circulate the Flyer before it 'goes live'		
		Final Flyer goes on the website and in the Bulletin		
		Website – set up booking system and inform Secretary on completion		
		Final Flyer sent out by e-mail to all contacts and included in the Bulletin if time allows		
		AGENDA – expect to consult before finalisation.		
		Produce first DRAFT and circulate to all participants, including Chair of the event and presenters.		
		Include the following: a) Title, Time & Date, Venue, YAHR logo b) Timings for parts of the agenda c) Time for Registration and coffee on arrival (usually 30 Minutes?) d) Comfort Breaks as appropriate e) Lunch break as appropriate f) Time for closing the event – so participants can plan their journeys home, parking fees etc		
		Acknowledge and consider all suggested amendments – make changes as appropriate.		
		Re-circulate FINAL agenda as above		
		Final Agenda goes on the website		
		Final Agenda sent out by e-mail to all contacts and included in the Bulletin if time allows		
		Secretary prints some spare Agendas for the day. Check any large print copies needed?		
		ATTENDANCE LIST – applications will be sent to the Secretary, who compiles the list		
		Other Team members forward <i>ad hoc</i> enquiries to the Secretary		
		Notes kept of Special Requirements (Access, Learning, Dietary)		
		List is forwarded to Venue Co-ordinator for catering arrangements		
		List is forwarded to Event Organiser		

		OTHER EVENT PREPARATION		
		'Meeter and Greeter' – cheerful person to make folk welcome from the door. Show where to hang coats, location of toilets etc		
		Signage – who is preparing them, putting them up, taking them down?		
		Registration – someone needs to arrive early to register arrivals		
		Name Badges – handwritten or produced from the list?		
		AV – someone checks all the AV equipment, sorts the laptop(s), projectors, checks visibility for audience.		
		Chair – welcome attendees etc also closes the event		
		Evaluation – decide format; produce appropriate materials		
AFTER THE EVENT				
		Send 'Thank you ' messages as appropriate		
		Ensure that any Expenses Claim forms are collected and posted to the Treasurer		
		Ensure that the Venue is thanked and all bills paid		
		Go through the Evaluation and produce a summary. Circulate to all contributors + YAHR colleagues		
		Consider producing a 'Lessons Learned' note for the next committee meeting or the Events Group		

DRAFT TIMELINE

Timings by months	
	Float initial idea to YAHR colleagues
E-Date – 3 / 4 months???	Advance Notice > website, e-mail, Bulletin
	Venue arrangements
	Co-ordinating event content/presenters
E-Date – 2/3 months ????	Final Flyer > website, e-mail, Bulletin
	Registration period – ongoing from above
E –Date – 1 month	Final Agenda and repeat circulation of Flyer > website, e-mail, Bulletin
E-Date – 1 week	Attendance lists to Organiser and Venue Co-ordinator
E-Date	EVENT DATE (E-DATE)

