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**WICT PNW Event Checklist**

This document is intended to assist Event Chairpersons develop a Program and Communications plan to support your overall Event Plan. This form details the communication and promotional elements that are available to promote your event. Also included is the event budget (itemized) to be sent to the Treasurer and President for approval and sponsorship invoice to be sent to Sponsor Chairs to drive additional revenue for each event.

**Event Details Form**

**Event Name:**

**Event Date:**

**Event Time:**

**Event Venue/Location:**

**Total Budget (see budget sheet):**

**Detailed Directions from various N/W/S/E points:**

**Event Attire:**

**Event Summary (Example: Guest Speaker – include full name, title, company; or Special Presentations / Awards):**

**Cost to Attend: (member / non-member prices)**

**Parking?:**

**Event Menu: (If you need to produce a menu, please provide copy)**

**RSVP deadline:**

*Please send this form to the Communications Chair (Jan Wachholz) and Programming Co-Chairs (Ashley Powers & Stephanie Kenison) for approval from WICT National and the creation of marketing materials and Eventbrite site. They need the event details form completed* ***at least eight weeks in advance*** *of your event in order to assist you with developing event communication vehicles (DM, email blasts, newsletter, website).*

**Event Planning Checklist**

This event planning checklist was created to assist our chapter leaders and volunteers, and to ease the pressure of preparing for successful events. It is a general checklist and it is important to always brainstorm in the beginning of your planning phase to customize this list to meet all of your objectives.

**5 or More Months Out:**

**Logistics**

* Establish preliminary concept and theme of event
* Visit potential sites; develop alternative site (if event is outdoors)
* Check proposed date for potential conflicts, finalize date in writing
* Appoint a logistics coordinator/select committees/chairpersons and form any subcommittees that might be needed
* Identify areas of need for outside suppliers such as audio visual and floral
* Get written contracts for site, entertainment, etc.
* Investigate need for special permits, licenses, insurance, etc.

**Budgeting**

* Draft initial budget (site rental, food, drinks, AV/sound/lights, etc.)
	+ Know exactly how much you will be charged. Understand the price structure, i.e., room rental or food and beverage minimum. Calculation should include tax and service charges. This is typically 30 percent. Remember that food costs are negotiable. If you have a specific budget, the caterer can come up with a menu to fit that budget.
* Get bids for entertainment; decorations; design/printing

**Marketing**

* Decide on a registration fee structure
* Create sponsorship amounts/levels
* Compile invitation list
* Set marketing/public relations schedule
* Select photographer; arrange for photos of VIPs, chair, honorees
* Send above details to Communications & Programming chairs for WICT national review and approval, creation of invitation and Eventbrite site.
* Partner with the Website Chair to add the event to PNW WICT website, LinkedIn, etc.
* Send out save the date announcement – Jan to send out this

**VIPs/speakers**

* Research/approach honorees if appropriate
* Invite/confirm VIPs
* Get biographical information on VIPs, honorees, chair

**3-5 Months out:**

**Logistics**

* Begin monthly committee meetings
* Set menu with caterer for food and beverages
* Finalize audio/visual contract
* Select/order awards/speaker gifts
* Secure permits and insurance
* Sign contract with entertainment or AV vendors
* Obtain audiovisual needs from speakers and presenters. Order all necessary equipment as soon as possible.
* Order any special linens or floral arrangements; napkins with logo

**Marketing**

* Request logos from corporate sponsors for printing
* Write/send requests for funding to major donors, corporations, sponsors (see sponsorship request form below)
* Prepare final copy for invitations and signage
* Complete lists for invitations
* Post information on your website

**3-4 weeks out:**

**Logistics**

* Review needs for signs at registration, directional, etc.
* Finalize transportation/hotel accommodations for staff, VIPs, honorees
* Hold walk-through of event with responsible committees, chairpersons and responsible site staff
* Obtain contracts for decorations and rental items
* Confirm staff for registration
* Plan seating or room arragements/set-up
* Give estimate of guests expected to caterer/food service
* Confirm hotel accommodations
* Confirm special needs for VIPs, event
* Prepare welcome packet for VIPs, chairmen, and key staff
* Schedule deliveries of special equipment, rentals
* Confirm setup and tear down times with event site
* Arrange for coat check if needed
* Create check list of all onsite materials

**Marketing**

* Obtain logos from corporate sponsors for program printing
* Sign contract with photographer
* Send invitations
* Release press announcements about VIPs, honorees
* Follow up to confirm sponsorships
* Review script/timeline
* Continually promote the event getting registrations
	+ Consider asking the board to contact members to drive event participation

**One Week Out:**

* Meet with all committees for last-minute details
* Confirm number attending
* Finish seating/table arrangements (if needed)
* Hold training session with volunteers; finalize assignments
* Secure two or three volunteers to assist with emergencies
* Distribute seating chart, assignments to hosts/hostesses
* Schedule pickup or delivery of any rented or loaned equipment
* Double-check arrival time and delivery times with vendors
* Reconfirm event site, hotel, transportation
* Deliver final scripts/ timelines to all program participants
* Finalize catering guarantee
* Final walk-through with all personnel
* Schedule rehearsals
* Establish amount of petty cash needed for tips and emergencies
* Update onsite materials checklist
* Send out reminder to register for those who haven’t
* Send out reminder to those who have registered

**Three Days Out:**

* Confirm with all vendors
* Print Nametags and registration/check-in materials
* Have raffle tickets available for drinks/raffle prizes if need
* Ask Jacque to bring the cash box, receipt pad and Square for credit card payments
* Create post event survey

**Day Before:**

* Prepare an event bin: nametags in alpha order, office supplies, blank nametags, schedule, presentation, guest list, giveaways, and signage
* Reconfirm with everyone involved (vendors internally and externally)
* Walk through every step of the event

**Day of Event:**

* Be early
* Set-up registration area
* Set-up all signage; make sure branding is very visible

**Day after Event:**

* Use nametags to establish attendance
* Send appropriate thank you’s; include photos
* Final budget review
* Determine how to “extend” event to those who could not attend; update web
* Obtain evaluations from attendees, board, and volunteers

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| --- |
| **EVENT BUDGET** |
| **Venue costs:** |  |
| **Speaker costs:** |  |
| **Catering costs** |  |
| **Parking costs:** |  |
| **Other (materials, A/V, etc):** |  |
| **Total costs:** |  |
| **Estimated return:****(est attendance/ticket cost)** |  |
| **Sponsorship revenue:****(list sponsorship details)** |  |
| **Overall estimated earnings/loss** |  |

**** **SPONSORSHIP INVOICE # 2016 – 101**

###### Date

*Name:*

*Company:*

*Address:*

*City, State Zip:*

*Phone #:*

*Fax #:*

*E-Mail:*

**Re: WICT PNW *event name* 2016**

Event Details

*When:*

*Time:*

*Where:*

 **Sponsorship Amount and Type: *$00* (*type of sponsorship*)**

**TOTAL PAYMENT DUE:** ***$00***

**Invoice is payable upon receipt.**

 Please make checks payable to **WICT PNW Chapter**

 Please mail checks to:

Jacque Hillsberry, WICT PNW Chapter Treasurer

c/o Comcast

9605 SW Nimbus Ave

Beaverton, OR 97008

WICT, PNW Chapter is a non-profit organization. Our **Tax I.D. #** 36-3550537

Thank you for your sponsorship! We look forward to seeing you at the event.

Best regards,

Joni Pierce

President

WICT Pacific Northwest Chapter