



Community Activity Planning Checklist

The quick guide and comprehensive checklist below are the most useful tool in your arsenal, and we hope that by following each item, planning events and activities will be a smooth and fun process.

If you require guidance on any aspects of your event planning, including speaker suggestions/invitations, contact your Alumni Relations representative. Additionally, if there are any points you'd like to recommend for inclusion in this document, please email communities.alumni@mcgill.ca.

QUICK EVENT GUIDE

- Determine objectives – purpose, audience, message.
- Outline a budget – events and activities should be cost-recovery.
- Logistics – date, time, place, price, staffing needs etc.
- Promotion – strategy and schedules of event communications, social media.
- Have fun!

COMPREHENSIVE PLANNING CHECKLIST

The following comprehensive planning checklist outlines the items to consider when planning your event, including suggested timelines.

2-3 months before the event

- Determine objectives, budget, and members of the planning team.
- What do you want to achieve by having this event?
- Is there a current need or an interest in this type of event?
- What is the size and scope of the event?
- Will the ticket revenues cover the anticipated event expenses (i.e., break-even)? If not, will there be funds from another source to cover the expenses?
- Do you have enough interested members on your planning team? Assign tasks and responsibilities to each member.



8 – 10 weeks before the event

Logistics

- Date and Time: Consider the target audience, other events happening around the same day, and major holidays in your region.
- Location: Consider your budget, projected attendance, and space requirements (i.e., room capacity, AV requirements and accessibility); is the venue available for the date you require?
- Budget: Accurate estimates minimize any surprises. Consider costs related to rental costs, food and beverage, audio visual, taxes and gratuities, insurance needs, speaker costs (i.e., travel and lodging, meals, transportation), and any other miscellaneous charges (i.e., materials and supplies, signage).
- Speaker: Is the speaker available for the required date? Who is the best person on the planning team to extend an invitation? It is recommended to build a brief list of suggested speakers should your first choice not be available.

Marketing and Promotion

- Marketing strategy: Does your event have a theme? What are the logos, images and pictures that need to be incorporated?
- Marketing tools: Will you use McGill's e-broadcast system? Social media? Or both?
- Distribution: How many e-broadcasts will be sent out to the target audience? How far in advance will you need to start promotion? Timeline is key to successfully promoting your event.

7 – 8 weeks before the event

Logistics

- Venue and Caterer: Confirm and secure the details with the venue and catering provider. Before confirming your event venue, please provide all quotes/contracts to your Alumni Relations Staff representative for review.
- Budget: Issue any deposits required to secure venue; if the event is not cost-recoverable, has the required additional funding been secured? Do not sign any contracts unless funding is secured.
- Speaker: Coordinate directly with speaker to book travel arrangements (if applicable).

Marketing and Promotion

- Draft and submit your event listing using the Volunteer Event Management Form at <https://www.alumni.mcgill.ca/broadcast>
- Coordinate with your Alumni Relations staff representative to map out your schedule of e-broadcasts communications.
- Schedule the Social Media posts.



6 – 7 weeks before the event

Marketing and Promotion

- Start promoting your event on social media to coincide with your first event promotion via McGill's e-broadcast system.
- Ensure all members of the team share the event through their networks.

4 – 6 weeks before the event

Logistics

- Order of Proceedings: Draft a preliminary agenda of how the event will unfold on the day of; breaking it down into 15-minute intervals and identify speaker/host/emcee role.
- Volunteers: Review volunteer requirements and recruit members to staff event as required. Ensure everyone receives a copy of the agenda and is briefed on their role.
- Budget: Review budget and determine if anticipated costs estimates are accurate and that funding is available to cover expenses.
- Supplies: If applicable request McGill memorabilia or additional materials from your Alumni Relations staff representative

Planning Team

- Check in: Are members of the planning team performing their assigned tasks and responsibilities? Do they require support on their tasks? This is a valuable step in ensuring planning is on track.
- Goals and Objectives: Is this event still meeting its goals and objectives set out at the start? If they have changed, ensure the event details are realigned to meet these new anticipated outcomes.

2 – 4 weeks before the event

Logistics

- Speaker: Review and reconfirm AV requirements or any special needs with the speaker
- Registration numbers: Review registration numbers to date; are the numbers meeting the targets? If higher or lower than expected, logistical and/or promotional arrangements may need to be adjusted accordingly.

2 weeks before the event

Logistics

- Order of Proceedings: Finalize the agenda outlining how the event will run and ensure all parties involved (i.e., speaker, venue, emcee, volunteers) receive a copy.
- Check in: With venue, caterer, AV, speakers, and volunteers to reconfirm the event details.
- Registration numbers: Review registration numbers to date and adjust logistics/promotion as needed.



Planning Team

- Check in: To discuss and finalize details; review any outstanding items and set deadline for completion.

1 week before the event

Logistics

- Reminders: Send out any final event reminders to registered guests, speaker(s) and volunteers
- Supplies: Prepare and/or purchase event supplies (nametags, signage, memorabilia, gifts, etc.) as applicable.
- Final numbers: Notify the venue and caterer of final registration numbers and confirm details.

Day of the event

Logistics

- Venue Set-up: Arrive early and double check all logistical details (i.e., catering and beverage, AV equipment, signage, number of chairs, room layout etc.) with onsite venue staff.
- Format: Know your Order of Proceedings and the program for the event; keep track of timing and ensure volunteers and speaker are briefed.
- Registration: Ensure that guests are marked off as they check-in. Following the event, please transfer this information over to your Alumni Relations staff representative to close your event off.
- Staff Management: Greet your volunteers and thank them for their contribution; ensure they are in position to greet guests upon arrival. Be sure to greet your guests and thank them for coming.
- Venue Break-down: Take down any signage, pack up any remaining supplies and/or clean-up room.

Following the event

Debrief

- Planning Team: Meet and discuss if the event target goals and objectives were met; what were the successes, challenges, and recommendations for future events; review any surveys sent out to attendees for feedback.
- Invoices: Pay any outstanding invoices to ensure event is closed off.
- Budget: Revise and present the final budget on the event showing expenses vs revenues.
- Closing Event: Send the final attendance list to your Alumni Relations staff representative.
- Follow-up: Send Thank You notes to all your volunteers and the speaker(s).