Checklist for planning and implementing an Event

Investigation and exploration
- Select a committee to investigate the possibility of holding an event
- Discuss specific goals and objectives for the event
- Identify audience/participants
- Choose several possible dates
- Check library literature for advice
- Contact individuals or institutions with similar experience for guidance
- If possible, attend a similar event
- Identify possible locations and costs
- Research menu or food options and costs
- Consider needed materials and costs
- Draft budget; consider additional expenses including:
  - Postage fees
  - Speaker/Musician/Entertainer fees
  - Decorations/Centerpieces
  - Wine and alcoholic beverages
  - Parking passes
  - Gifts and/or awards
- Explore funding and sponsorship options

Solidify buy-in
- Create talking points that maximize the benefits for the institution and anyone involved
- Obtain support from library administration
- If necessary, expand committee from exploration to implementation size and create subcommittees
- Select a date for the event
- Check calendars and enter selected date
  - Speakers/Officials/Administrators
  - Your calendar
  - Scheduling of possible locations
  - Your library’s calendar
  - Community calendars
- Introduce the concept to other library personnel
- Share the event with key administrative figures outside of the Library (if possible, talk to administrative assistants that can schedule the event on the key figures’ calendars)

Firming up plans
- Reserve location
- Determine need for map/directions/internet presence
- Determine and order food and/or beverages
- Identify and order any other needed materials (nametags, flipcharts, etc.)
- Ensure that available technology is adequate for your event needs
- Schedule time with IT personnel – both to plan the event and to enter the event on the IT calendar for technology help the day of the event
- Create any materials to share with invited participants in advance of the event
- Fill out all appropriate forms and relevant paperwork
- Develop calendar for information/publicity releases
Reinforcing buy-in

- Promote the event to other key personnel
- Remind library personnel of the event, with additional details
- Select staff/outsiders needed for the event
- Identify specific duties
- Provide relevant training

Details, details, details

- Disseminate invitations and/or publicity
- Ensure that needed materials are gathered (flipcharts, nametags, markers, pencils, etc.)
- Review duties with people who will be part of the event
- Create materials that will be distributed at the event
  - Educational materials
  - Promotional materials
  - Evaluation materials
  - Follow-up materials
- Consider staging a practice session
- Confirm location, food, and external participants
- Arrange for a photographer
- Review on-site signage
- Research information needed for introductions

Last minute crunch

- Identify someone to help with general last minute “gopher” duties
- Set up materials and prepare location for event
- Confirm participation of key people
- Test AV equipment

Event

- ENJOY!
- Count your numbers
- Distribute and collect evaluations

Follow-up

- Thank yous (to attendees, key administrators, and all helpers)
- Compile results or evaluations
- Review what went well, what did not work
- Disseminate results (to library personnel, to attendees, to community) for transparency and publicity