Pacific Institute
for Climate Solutions

EVENT PLANNING CHECKLIST

How to host impactful climate events



INITIAL PLANNING | 3-6 months out

- [ ] **Define your goal and target audience**
  - [ ] What is the event purpose? Who do you want to participate?
- [ ] **Develop a budget:** Make a spreadsheet listing potential costs and revenue sources (e.g. space rental, ticket sales).
- [ ] **Set the date and time:** Check the availability of speakers or key participants and conflicts with other events.
- [ ] **Select and book a venue:** Check date availability, capacity, accessibility and availability of amenities. For hybrid and virtual events, confirm tech needs.
- [ ] **Identify key partners/ collaborators:** Confirm priority speakers, presenters, or facilitators.
- [ ] **Insurance and special permits:** Check to see if any special permits or liability insurance may be required.

LOGISTICS | 2-3 months out

- [ ] **Plan and delegate:** List tasks and delegate responsibilities for each item.
- [ ] **Meet with partners** to confirm roles and maximize each other's strengths.
- [ ] **Book speakers, facilitator and contract services:** Finalize contracts for food, audio-visual, speakers or entertainment.
- [ ] **Confirm Land Acknowledgement speaker** and prepare speaking notes if necessary.
- [ ] **Identify potential VIPs** or special guests.
- [ ] **Confirm venue details:** Finalize venue details (start and end times) and plan layout for seating and activity areas.
- [ ] **Confirm equipment needs:** Tables, chairs, A/V systems. Confirm availability with venue, arrange additional equipment if needed.
- [ ] **Plan for honorariums:** Determine payment, if any, for participants or speakers
- [ ] **Prep speakers:** Provide direction to speakers/participants about focus of presentations or sessions, including any specific questions to be addressed and what is in or out of scope for any engagement sessions.

LOGISTICS (CONTINUED) | 2-3 months out

- [ ] **Recruit volunteers** if needed, confirm number of volunteers needed and what tasks they will be assigned.
- [ ] **Plan for accessibility and inclusivity:** Review venue accessibility, review participant or speaker accessibility requests, prepare special signage or translation services if needed, arrange parking or rides if necessary.
- [ ] **Plan security and safety:** Identify risks and create a safety plan.

PROMOTION | 1-2 months out

- [ ] **Make event visuals:** Create an event poster that can be customized to different sizes for print and social media promotion
- [ ] **Launch registration:** Set up an online RSVP or ticketing page. Eventbrite is an easy-to-use and inexpensive option.
- [ ] **Promote!** Use social media, community flyers, local newspapers, and email newsletters. Follow up repeatedly to continue promotion up until the event.
- [ ] **Prepare targeted invitations** for key participants and VIP's

FINAL PREPARATIONS | 1-2 weeks out

- [ ] **Confirm Everything:** Re-confirm with venue and caterer (with final numbers).
- [ ] **Finalize "Run of Show":** Create a minute-by-minute schedule including MC, introductions and closing.
- [ ] **Prepare signage, materials and an agenda** for participants (include the event name and logo to avoid confusion).
- [ ] **Send reminder to speakers with the final agenda** to confirm timing, location and presentation length.

EVENT DAY

- [ ] **Setup/Tear Down:** Arrive early for setup and plan who is responsible for clean up afterwards.
- [ ] **Mic check:** Final check of room setup and A/V (test microphones, slide decks, and any video feeds).
- [ ] **Manage activities:**
  - [ ] Manage volunteers and assign to task such as greeting and registration.
  - [ ] Assign someone to take photos/video at the event (on a phone will do).
  - [ ] Ensure notes are being taken to capture engagement/key themes.
  - [ ] Enjoy yourself and engage with the community.
- [ ] **Evaluation and feedback:** Make time near the end of the event for participants to fill out an event evaluation or feedback form. Get creative, offer a prize for completed forms.
- [ ] **Reinforce a take home message:** Close on a positive note and reinforce a message of how participants can take action or stay engaged.

POST-EVENT | 1-2 months out

- [ ] **Send thank you notes** to speakers, partners, volunteers and sponsors.
- [ ] **Review feedback and debrief:** Review participant feedback and organize a debrief with the event team to reflect on what worked well and what didn't.
- [ ] **Finalize financials:** Wrap up the budget by entering final costs and revenues
- [ ] **Celebrate:** Update webpage and social media with event photos and metrics to celebrate your event successes
- [ ] **Follow up with participants:** Send updates to participants summarizing highlights of the event and any actions or next steps you'd like them to take. Highlight opportunities for ongoing engagement and any 'quick wins' or updates following the event.