Designing Your Ideal Event:
A Practical Tool for Planning & Partnering

Planning a successful event requires intention, clarity, and coordination. Whether you're preparing for an upcoming conference, evaluating internal capacity, or exploring external support options, this scope of work tool is designed to help your team:

- Clearly define the event management tasks that are essential to your success
- Determine which responsibilities are best handled in-house and which might benefit from external expertise
- Develop a robust request for proposal (RFP) or prepare for internal planning conversations

The checklist that follows is adapted from Event Garde's standard event management services. It's a comprehensive framework that you can use to organize your team's thoughts, align roles, and identify potential support needs—either now or in the future.

If, after reviewing, you'd like to explore how Event Garde might assist with your event, we're happy to talk. But first and foremost, this document is here to help you build a thoughtful, right-sized plan that aligns with your team's goals, capacity, and vision.

Accessibility	Need Now	Future Need	N/A
Confirm ADA compliance with venue and vendors			
Offer accommodations for dietary, mobility, and neurodiverse needs			
Ensure communications and signage are accessible			

Agenda	Need Now	Future Need	N/A
Review and strategically update agenda to reflect member needs			
Maintain event agenda (e.g., times, room locations) based on team input			

Audiovisual	Need Now	Future Need	N/A
Develop and manage A/V RFP and contract process			
Meet with A/V team throughout planning			
Finalize room layouts and A/V orders			
Coordinate tech checks and rehearsals			
Provide all speaker decks to A/V in advance			
Secure and share keynote rider(s), if applicable			
Conduct tech pre-con meeting			
Support A/V onsite and troubleshoot as needed			
Hold post-event A/V debrief			

Board/Committees	Need Now	Future Need	N/A
Coordinate meeting room setup, A/V, and F&B with hotel			
Arrange board/committee housing and transportation			

Continuing Education	Need Now	Future Need	N/A
Confirm whether continuing education (CE) credits will be offered and determine the type(s) of credit available			
Identify accrediting bodies and review their requirements and deadlines			
Collect speaker bios, learning objectives, and presentation materials			
Coordinate the creation of session evaluation forms (as required by accrediting body)			
Draft and submit necessary documentation or applications to secure pre-approval			
Create a session tracking mechanism (e.g., scanning, sign-in sheets, mobile app logging)			
Ensure tracking tools are functioning correctly onsite and			

staff/volunteers are trained to support			
Collect and reconcile attendance records for credit eligibility			
Generate and distribute certificates of attendance or CE verification			
Submit final attendance/completion records to accrediting body as required			
Maintain records for audit purposes (typically 3–7 years depending on provider)			

Emergency Management	Need Now	Future Need	N/A
Collaborate with venue to create and share an emergency plan			
Share emergency contacts and procedures with staff and key vendors			

Exhibitors/Sponsors	Need Now	Future Need	N/A
Manage general service contractor (GSC) RFP and contract			
Liaise with GSC during planning and onsite			
Develop and distribute online exhibitor manual			
Attend sponsor calls with concepting/logistics lens as needed			
Troubleshoot sponsor/exhibitor needs pre-event			
Develop/manage sponsor/exhibitor registration process			
Ensure onsite delivery of sponsor/exhibitor deliverables			
Hold post-event exhibitor/sponsor debrief			

Finances	Need Now	Future Need	N/A
Use approved event budget as planning guide			
Track and update budget throughout event lifecycle			
Reconcile and process invoices			
Identify appropriate gratuities and disseminate accordingly onsite			
Confirm reconciled budget post-event			

History	Need Now	Future Need	N/A
Record historical data (e.g., F&B minimums/spend, meal counts, housing pickup)			
Document lessons learned in centralized archive			

Hotel	Need Now	Future Need	N/A
Fulfill hotel contract obligations			
Share draft event needs and diagrams			
Approve final event orders			
Manage guest room deliveries and amenities			

Housing	Need Now	Future Need	N/A
Recommend room block size based on historical trends			
Manage rooming lists, sub-blocks, and overflow housing			
Act on regular housing reports and conduct room audits			

Liaise with hotel housing rep on attendee issues			

Marketing & Communications	Need Now	Future Need	N/A
Develop and manage event messaging timeline			
Recommend key messaging for special events			
Monitor engagement and adjust strategies as needed			

Meetings	Need Now	Future Need	N/A
Participate in regular and ad hoc team meetings			
Conduct pre-con with venue staff and suppliers			
Facilitate after-action-review to identify key insights			

Mobile App / Technology Tools	Need Now	Future Need	N/A
Select app provider and support implementation			
Recommend content tiles and help draft key messages			
Train staff/speakers on app features			

Photography	Need Now	Future Need	N/A
Source photographer and negotiate contract			
Create and review photo schedule with team			

Orient photographer and ensure schedule is followed			

Planning Visit	Need Now	Future Need	N/A
Schedule site visit			
Meet hotel team, walk space, align requirements			
Answer staff questions and address concerns			

Registration	Need Now	Future Need	N/A
Participate in planning calls with registration team/vendor			
Provide input on pricing, packages, and badge design			
Support setup of registration platform			
Manage supply orders			
Coordinate dietary needs with hotel and prepare dietary cards			
Coordinate name badge printing and badge scanning/lead retrieval			
Assemble badge holders with dietary cards, ribbons, and tickets			
Train registration staff and volunteers			
Set up registration area and supervise onsite operations			
Tear down registration and prepare materials for outbound shipping			
Inventory leftover supplies (e.g., badges, lanyards, ribbons)			
Finalize and update SOPs based on post-event learnings			

Security	Need Now	Future Need	N/A
Identify needs and contract security services			

Share schedule/expectations and manage onsite presence			

Shipping	Need Now	Future Need	N/A
Confirm shipping address and delivery window			
Break down pallets and organize office onsite			
Consolidate and pack materials post-event			
Confirm outbound shipment is scheduled/picked up			

Signage	Need Now	Future Need	N/A
Finalize signage template with vendor			
Gather signage needs, submit to vendor, and review proofs			
Confirm onsite delivery against final order			
Distribute and manage signage throughout event			

Sourcing	Need Now	Future Need	N/A
Partner with sourcing company			
Support venue RFP and short-listing process			
Conduct site visits and recommend venue			
Review and help finalize venue contract			

Speaker Management	Need Now	Future Need	N/A
Ensure speakers meet deadlines and requirements			
Collect and deliver slide decks to A/V			
Provide prep/orientation materials to speakers			
Deliver speaker ratings/feedback post-event			

Special Events	Need Now	Future Need	N/A
Coordinate external vendors (e.g., band, decor, lighting)			
Manage "in conjunction with" group logistics			
Oversee off-site event planning and transportation			

Staff	Need Now	Future Need	N/A
Coordinate staff housing and travel details			
Develop onsite staff schedule			
Train staff to support event functions			
Organize and set up the onsite staff office			
Provide onsite staffing resources			
Facilitate internal communication processes during the event (e.g., group chat)			
Schedule and lead daily onsite staff huddles			

Strategy	Need Now	Future Need	N/A
Analyze feedback and non-attendance data to inform planning			
Define strategic goals and success measures			

Evaluate alignment with organization mission, values, and vision			
Develop a target audience matrix			
Support education content selection and organization			
Build evaluation tools tied to strategic goals			

Sustainability & Waste Management	Need Now	Future Need	N/A
Define event sustainability goals (e.g., reduce printing)			
Coordinate recycling and waste diversion with venue			
Document and report on sustainable practices			

Task Management	Need Now	Future Need	N/A
Create shared system to track milestones (e.g., Smartsheet)			
Automate task reports and share with team			
Train team on task management system			
Assign dedicated project manager to monitor task completion			

Transportation	Need Now	Future Need	N/A
Evaluate and contract transportation vendor			
Coordinate transportation for all key stakeholders			
Manage confirmations and changes			

VIPs	Need Now	Future Need	N/A
Determine and follow through on VIP needs			

Volunteers	Need Now	Future Need	N/A
Identify volunteer roles and responsibilities			
Setup tool to recruit and confirm volunteer participation			
Develop and deliver volunteer training			
Provide onsite support and respond to volunteer questions			

Are there any additional event functions or responsibilities not identified in this tool that are relevant to your planning? Use the space below to note any unique needs or considerations.

Additional Tasks/Comments	Need Now	Future Need	N/A

Next Steps

We hope this planning tool helps your team reflect on priorities, clarify internal roles, and identify areas where additional support may be helpful—whether that's now or down the road.

If you'd like to talk through your selections, explore potential collaboration, or simply get a second set of eyes on your plan, we're happy to connect. We're here as a resource—no pressure, just partnership.

Please don't hesitate to reach out with questions or to schedule a conversation.

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