

Event Planning Checklist - Brief

Printable companion. Adapt every row with qualified human owners.

Not a safety, accessibility, legal, permit, privacy, or event-success guarantee.

brief-01 | Define the event purpose and intended outcome

Owner: event_lead | Ready when: An accountable sponsor can state why the event should exist | Depends on: none

Contingency: Pause commitments until the purpose is reviewable

Status: not_started | Evidence: _____

brief-02 | Define audience and aggregate attendance range

Owner: event_lead | Ready when: The purpose is recorded | Depends on: brief-01

Contingency: Use a bounded planning range until evidence improves

Status: not_started | Evidence: _____

brief-03 | Name decision owners and escalation paths

Owner: event_lead | Ready when: The event scope is reviewable | Depends on: brief-01

Contingency: Escalate unowned decisions to the sponsor

Status: not_started | Evidence: _____

brief-04 | Set success measures and evidence owners

Owner: event_lead | Ready when: The intended outcome is recorded | Depends on: brief-01

Contingency: Keep qualitative measures when attribution is uncertain

Status: not_started | Evidence: _____

brief-05 | Record event assumptions and explicit exclusions

Owner: event_lead | Ready when: Audience and outcome assumptions are available | Depends on: brief-02

Contingency: Reopen the brief when an assumption changes

Status: not_started | Evidence: _____

brief-06 | Approve a change-control path

Owner: event_lead | Ready when: Decision owners are named | Depends on: brief-03

Contingency: Freeze new scope until an owner accepts the impact

Status: not_started | Evidence: _____

Event Planning Checklist - Plan

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plan-01 | Build the forecast budget and contingency line

Owner: finance_lead | Ready when: The brief and attendance range are reviewable | Depends on: brief-02

Contingency: Reduce scope or seek an explicit budget decision

Status: not_started | Evidence: _____

plan-02 | Assess venue suitability and shared responsibilities

Owner: venue_lead | Ready when: Format capacity and operating window are known | Depends on: brief-02

Contingency: Keep an alternate venue or format decision open

Status: not_started | Evidence: _____

plan-03 | Define vendor scope acceptance evidence and handoffs

Owner: operations_lead | Ready when: Venue and budget assumptions are available | Depends on:

plan-01;plan-02

Contingency: Retain an alternate supplier or reduced-scope path

Status: not_started | Evidence: _____

plan-04 | Assign accessibility review and accommodation process

Owner: accessibility_lead | Ready when: Audience format and venue assumptions are known | Depends on:

brief-02;plan-02

Contingency: Escalate barriers and provide an alternate participation path

Status: not_started | Evidence: _____

plan-05 | Minimize attendee data and assign access and retention decisions

Owner: privacy_lead | Ready when: Registration purpose and follow-up need are defined | Depends on: brief-01

Contingency: Remove optional fields or use opaque references

Status: not_started | Evidence: _____

plan-06 | Create a proportionate safety and emergency planning handoff

Owner: safety_lead | Ready when: Venue format scale and major hazards are reviewable | Depends on: plan-02

Contingency: Escalate to venue and qualified local owners

Status: not_started | Evidence: _____

Event Planning Checklist - Registration and Communications

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registration-01 | Select and verify the registration path

Owner: registration_lead | Ready when: Capacity fields confirmation and fallback needs are defined | Depends on: brief-02;plan-05

Contingency: Use a reviewed manual request path during provider outage

Status: not_started | Evidence: _____

registration-02 | Define required and optional registration fields

Owner: privacy_lead | Ready when: The attendee data boundary is approved | Depends on: plan-05;registration-01

Contingency: Remove any field without a reviewed purpose

Status: not_started | Evidence: _____

registration-03 | Prepare confirmation reminder change and cancellation messages

Owner: communications_lead | Ready when: Registration behavior and event facts are stable | Depends on: registration-01

Contingency: Publish a reviewed status channel and manual contact path

Status: not_started | Evidence: _____

registration-04 | Publish accessible practical joining information

Owner: accessibility_lead | Ready when: Venue routes remote access and communication support are reviewed | Depends on: plan-04;registration-03

Contingency: Offer an alternate format or assistance path

Status: not_started | Evidence: _____

registration-05 | Define capacity waitlist and closure decisions

Owner: registration_lead | Ready when: Hard capacity and responsible decision owner are recorded | Depends on: registration-01;plan-02

Contingency: Pause new requests and preserve an auditable queue

Status: not_started | Evidence: _____

registration-06 | Approve data export access and disposal ownership

Owner: privacy_lead | Ready when: Collection purpose providers and follow-up need are known | Depends on: registration-02

Contingency: Restrict exports and use the approved system of record

Status: not_started | Evidence: _____

Event Planning Checklist - Final Readiness

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readiness-01 | Freeze the event facts and owner roster

Owner: event_lead | Ready when: Material venue program vendor and registration decisions are reviewable |

Depends on: plan-03;registration-05

Contingency: Log late changes and re-run affected checks

Status: not_started | Evidence: _____

readiness-02 | Walk venue routes and accessibility support

Owner: accessibility_lead | Ready when: Venue setup and participant journey are available | Depends on:

plan-04;readiness-01

Contingency: Document alternate routes formats and support handoffs

Status: not_started | Evidence: _____

readiness-03 | Run an emergency communications tabletop

Owner: safety_lead | Ready when: Roles channels venue handoffs and plausible scenarios are defined | Depends

on: plan-06;readiness-01

Contingency: Escalate unresolved gaps to qualified owners

Status: not_started | Evidence: _____

readiness-04 | Rehearse the run of show and critical handoffs

Owner: operations_lead | Ready when: Program owners suppliers and operating window are stable | Depends on:

readiness-01

Contingency: Use the fallback task recorded for each critical segment

Status: not_started | Evidence: _____

readiness-05 | Test check-in outage and walk-in reconciliation

Owner: registration_lead | Ready when: Primary check-in method capacity rules and data access are reviewed |

Depends on: registration-05;readiness-04

Contingency: Use a controlled manual list and reconcile after recovery

Status: not_started | Evidence: _____

readiness-06 | Complete the human readiness review

Owner: event_lead | Ready when: Accessibility safety operations privacy and finance owners report status |

Depends on: readiness-02;readiness-03;readiness-04;readiness-05

Contingency: Delay reduce scope or accept risk through an accountable decision

Status: not_started | Evidence: _____

Event Planning Checklist - Event Day

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eventday-01 | Confirm accountable leads and escalation channels

Owner: operations_lead | Ready when: Authorized owners are present and handoffs are tested | Depends on: readiness-06

Contingency: Activate named alternates and the approved escalation path

Status: not_started | Evidence: _____

eventday-02 | Verify venue setup routes signs and support points

Owner: venue_lead | Ready when: Access to the configured venue is available | Depends on: eventday-01

Contingency: Hold opening or use the reviewed alternate route

Status: not_started | Evidence: _____

eventday-03 | Open registration and check-in with fallback ready

Owner: registration_lead | Ready when: Capacity status and controlled attendee system are available |

Depends on: eventday-01;readiness-05

Contingency: Switch to the reviewed manual fallback and reconcile

Status: not_started | Evidence: _____

eventday-04 | Operate the run of show and record material deviations

Owner: operations_lead | Ready when: Venue program suppliers and event leads are ready | Depends on:

eventday-02;eventday-03

Contingency: Invoke segment contingency and escalate consequences

Status: not_started | Evidence: _____

eventday-05 | Monitor accessibility and communication support

Owner: accessibility_lead | Ready when: Participant-facing routes formats and support points are active |

Depends on: eventday-02

Contingency: Provide the reviewed alternate participation path

Status: not_started | Evidence: _____

eventday-06 | Record incidents and decisions in approved systems

Owner: safety_lead | Ready when: Qualified response owners and reporting paths are active | Depends on:

eventday-01

Contingency: Follow venue and local qualified-owner procedures

Status: not_started | Evidence: _____

Event Planning Checklist - Closeout

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closeout-01 | Reconcile attendance requests and check-in records

Owner: registration_lead | Ready when: The event has ended and systems of record are available | Depends on: eventday-03

Contingency: Resolve discrepancies before producing aggregate reports

Status: not_started | Evidence: _____

closeout-02 | Reconcile commitments invoices and actual budget

Owner: finance_lead | Ready when: Vendor evidence and approved commitments are available | Depends on: eventday-04;plan-01

Contingency: Escalate variances through the decision log

Status: not_started | Evidence: _____

closeout-03 | Apply reviewed retention and disposal decisions

Owner: privacy_lead | Ready when: Follow-up purpose and record owners are confirmed | Depends on: closeout-01;registration-06

Contingency: Restrict access until approved disposal completes

Status: not_started | Evidence: _____

closeout-04 | Collect structured feedback and operational evidence

Owner: event_lead | Ready when: Feedback purpose and data boundary are approved | Depends on: closeout-01

Contingency: Use aggregate or anonymous evidence where appropriate

Status: not_started | Evidence: _____

closeout-05 | Debrief owners vendors and venue

Owner: event_lead | Ready when: Material evidence incidents deviations and costs are reviewable | Depends on: closeout-02;closeout-04

Contingency: Schedule a bounded follow-up for unresolved items

Status: not_started | Evidence: _____

closeout-06 | Record lessons changes and accountable next actions

Owner: event_lead | Ready when: The debrief and outstanding risks are documented | Depends on: closeout-03;closeout-05

Contingency: Keep open actions with owners and review markers

Status: not_started | Evidence: _____