

HBA Event Planning Checklists

Last Modified on 06/09/2026 2:03 pm EDT

Planning an HBA event of any kind has a major impact on your membership! Events are one of the primary ways that HBA members and guests experience the HBA, so you directly impact the HBA's mission with every event, small or large!

To make planning as easy as possible, please follow the HBA event planning standard operating procedure, below. The HBA has created two separate SOPs, one for in-person educational programs and one for in-person networking events (since the scope of planning a networking event is often smaller), which can act as a project tracker across planning stages for your planning team and ensure you don't miss a thing. The Educational Events checklist can also be adapted to meet the needs of virtual events if needed.

Within each SOP, enter the event date (or tentative event date) and the names of your team members, where indicated at the top of the sheet and the document will populate all of your target deadlines and action item owners. Save this document somewhere your team can access and update it collaboratively as you work through the process.

Standard Operating Procedures Checklists:

- [Event Planning Checklist - In-Person Educational Events.xlsx](#)
- [Event Planning Checklist - In-Person Networking Events.xlsx](#)

Additional resources:

- [Event content guidelines](#)
- [Event speaker management guidance](#)

If you have additional questions, please contact your regional president of education and events or HBA Central at events@hbanet.org.
