






EVENT PLANNING CHECKLIST

TASK		CONSIDERATIONS
4 TO 6 MONTHS OUT	<input type="checkbox"/> Determine goals and purpose of event	<ul style="list-style-type: none"> Who is your target audience for the event? What are your key messages? What do you hope to accomplish? How will you gauge success? Do you need to have an event?
	<input type="checkbox"/> Select date and time	<ul style="list-style-type: none"> Ensure hosts, VIPs, and/or speakers are available for specified dates and confirm on their calendar Consult campus and religious calendars Consider additional factors (traffic in large cities, sunset for outdoor events, etc.)
	<input type="checkbox"/> Set a budget	<ul style="list-style-type: none"> <u>Budget template</u>
	<input type="checkbox"/> Schedule and attend site visits	<ul style="list-style-type: none"> <u>Site Visit Notes template</u>
	<input type="checkbox"/> Consider a rain plan	<ul style="list-style-type: none"> Determine who will make the rain plan call and when Determine how and when you will communicate with guests Consider potential needs such as additional staff, umbrellas, tenting, etc.
	<input type="checkbox"/> Determine guest list	<ul style="list-style-type: none"> Campus VIPs Student leaders Key volunteers/board members Honorees and honoree guests Donor groups and/or prospects
	<input type="checkbox"/> Develop a communications plan	<ul style="list-style-type: none"> What is your event's main message? How will event details be communicated internally and externally? What channels will you utilize to get the word out? Include event details on internal and external calendars Create a timeline for event communication.

	<div data-bbox="237 180 273 215"></div> Determine if you will live stream your event	<ul style="list-style-type: none"> • <i>Who is coordinating?</i> • <i>Where will the webcast run on the website?</i> • <i>When will the site go live?</i> • <i>Can you run analytics afterward? If so, do for assessment purposes</i>
	<div data-bbox="237 349 273 384"></div> Review Foundation policies	<ul style="list-style-type: none"> • <u>UGAF Event Approval Policy</u> • <u>UGAF Event Approval Form</u>
	<div data-bbox="237 518 273 553"></div> Create the event in GAIL	<ul style="list-style-type: none"> • <i>If this is a paid event, send to Jennifer Hancock for approval</i> • <i>Include registration options and pricing</i> • <i>Include fund number where revenue will be directed</i> • <i>Including a gift? This will affect your fund designations</i>
	<div data-bbox="237 686 273 722"></div> Book hotel room block	<ul style="list-style-type: none"> • <i>Where are guests traveling from?</i> • <i>Will guests need to arrive early in the morning or stay into the evening?</i>

TASK		CONSIDERATIONS
2 TO 4 MONTHS OUT	 Secure venue <u>Venue and Vendor recommendations</u>	<ul style="list-style-type: none"> A/V capabilities Parking availability/restrictions Capacity/Format Other events occurring near space – will they conflict? Accessibility Access times to space Load-in/delivery capabilities Included equipment with room rental Surrounding sound impediments Security issues <p>Use the UGAF <u>contract checklist</u> when you are ready to confirm</p>
	 Secure catering and decor <u>Catering recommendations</u>	<ul style="list-style-type: none"> Do any of your guests have dietary restrictions? Determine VIP's F&B preferences What will caterer provide? Linens, centerpieces, etc.
	 Secure entertainment	<ul style="list-style-type: none"> Determine whether you will need background music, either live or piped in If you are using a streaming service, make sure it is the paid version so you don't have commercials
	 Secure parking and transportation	<ul style="list-style-type: none"> Think about whether you need reserved parking for VIPs or any guests with limited mobility. If possible, provide guests an address for GPS Make sure parking services is aware of your event and that you communicate with guests where to park and cost (if applicable).
	 Secure additional rental items	<ul style="list-style-type: none"> Rented chairs Stage Pipe and Drape Podium Tables Easels Coat racks Heaters <p>Note: <u>Facilities management</u> may have more affordable equipment than other vendors</p>

■	Secure AV needs	<ul style="list-style-type: none"> • <i>Lighting</i> • <i>Sound</i> • <i>Videography</i> • <i>Powerpoint/Screen/Video with wireless advancer</i> • <i>Microphones</i> • <i>Confidence monitors</i> • <i>Ensure you have an on-site AV technician for the event</i>
■	Secure photographer	<ul style="list-style-type: none"> • <i>Provide a shot list detailing what photos you will want to have taken</i> • <i>Will you need 1 or 2 shooters? Example: one to take onstage photos while one manages step and repeat</i>
■	Create an event registration page	<ul style="list-style-type: none"> • <i><u>AskIT request</u>, whether it is a paid event or not</i> • <i>If you have various registration options, include specific information about each option and associated registration fees</i> • <i>Include event logistics (date, time, location, any other information you have) on both the registration and confirmation pages.</i>
■	Create invitation design	<ul style="list-style-type: none"> • <i>Get approval from the appropriate parties, particularly with anyone who's name is on the invitation as a host or featured guest.</i> • <i>Determine RSVP deadline and include contact information for any questions</i> • <i>Remember attire, parking information and other relevant details</i>
■	Determine staffing needs and secure volunteers	<ul style="list-style-type: none"> • <i>Registration</i> • <i>Directional greeters</i> • <i>VIP Points of contact</i> • <i>Post-event breakdown and clean up</i>
■	Order giveaway items	<ul style="list-style-type: none"> • <i>In most cases you will need <u>trademark approval</u></i> • <i>Consider production and shipping time</i> • <i>May include any awards/trophies</i> • <i>If possible, do not include specific information so items can be reused</i> • <i>Consider partnering with other departments to cut costs.</i> • <i>Confirm in-hands date</i>

	■	Determine onsite print materials and get bios/headshots from speakers or honorees	<ul style="list-style-type: none"> • <i>Printed program</i> • <i>Menu Cards</i> • <i>Table numbers</i> • <i>Signage (podium sign, sponsor signage, directional signs, etc)</i>
	■	Request and process invoices for deposits	<ul style="list-style-type: none"> • <i>Schedule payment reminders to ensure timely payment</i> • <i>If they are not setup in the system, they will need to fill out a W9 form</i> • <i>Determine if your vendor requires pre-payment or is net-30</i>
	■	Order stamps, address envelopes, and mail invitations	<ul style="list-style-type: none"> • <i>Schedule volunteers to help stuff and stamp print invitations</i> • <i>Mail 4-6 weeks out for larger events or events where guests will need to travel</i> • <i>Mail 2-4 weeks out for smaller events where guests are local to the area</i>
	■	Send invitations to the printer	<ul style="list-style-type: none"> • <i>If time allows, get a printed proof. If not, request a digital proof for quality control</i> • <i>Confirm in-hands date</i>

TASK		CONSIDERATIONS
4 TO 6 WEEKS OUT	■ Confirm the menu with your caterer	<ul style="list-style-type: none"> Communicate dietary restrictions Discuss service options for food and beverages
	■ Determine signage needs and have signs printed	<ul style="list-style-type: none"> Directional yard signs Elevator signs directing guests to a particular floor Reserved parking signs Interior directional signs Registration and alphabet breakdown signs
	■ Confirm accessibility resources	<ul style="list-style-type: none"> Consult the University guide for planning accessible events.
	■ Book campus police, if necessary	<ul style="list-style-type: none"> Security and crowd control Directing traffic; entry/exit traffic flow
	■ Order special gifts for speakers or VIP guests	<ul style="list-style-type: none"> Create a plan for the presentation of gifts
	■ Edit onsite print materials and send to printer	<ul style="list-style-type: none"> Have any individuals included in a printed program review/approve.
	■ Schedule a script reading and AV run-through	<ul style="list-style-type: none"> Script reading the week before the event AV run-through the day before or morning of the event
	■ Schedule any facilities management requests	<ul style="list-style-type: none"> Furniture setup/breakdown Extra trash and/or recycling bins Spray for bugs and/or blow leaves or pollen

TASK		CONSIDERATIONS
1 TO 2 WEEKS OUT	■ Finalize script for all VIPs and presenters	<ul style="list-style-type: none"> • Work with DARCOMM and the President's office, if necessary • Include stage, video, and lighting cues in red font • When speakers are providing their own remarks ensure they aren't redundant • Include phonetic pronunciations for names that may be difficult to pronounce
	■ Request final invoices from vendors	<ul style="list-style-type: none"> • If they are not setup in the system, they will need to fill out a W9 form
	■ Final walk through with vendors	<ul style="list-style-type: none"> • Ideally, all vendors will be included so they can ask questions of each other and the venue contact.
	■ Send an RSVP reminder to those who haven't responded	<ul style="list-style-type: none"> • Remind them that the RSVP deadline is coming up and include event logistics • This may not be necessary due to numbers/capacity
	■ Send final guest number to the caterer	<ul style="list-style-type: none"> • Give a ballpark a couple of weeks out and confirm upon the RSVP deadline
	■ Create seating chart	<ul style="list-style-type: none"> • Send to VIPs for approval • Allow for back-up options so that you have flexibility for changes
	■ Print nametags	<ul style="list-style-type: none"> • Check GAIL nametag attributes and confirm the correct names • Sometimes name attributes are listed as "myself" • Changing to preferred name, for example, Sam Smith instead of Samuel
	■ Create event timeline	<ul style="list-style-type: none"> • Event timeline template • Distribute to all vendors, volunteers and staff involved in the on-site management of the event
	■ Prepare event briefing	<ul style="list-style-type: none"> • Distribute to program participants and VIPs detailing parking, guest arrival, program, menu, RSVP list, layout, seating chart, maps, etc.
	■ Create packing list and begin gathering event supplies	<ul style="list-style-type: none"> • Include everything you will need to take with you to the venue

	■	Ship event supplies for out-of-town events	<ul style="list-style-type: none"> • <i>Confirm address and attn with venue contact</i> • <i>Send venue contact tracking information</i> • <i>Include a return UPS shipping label in the box to facilitate return</i>
	■	Schedule a post-event meeting	<ul style="list-style-type: none"> • <i>Determine internal and external stakeholders who should be included</i>
	■	Prepare your post-event communication	<ul style="list-style-type: none"> • <i>Thank you for attending</i> • <i>Next steps (if applicable)</i> • <i>Event photos</i> • <i>Event survey</i>

TASK		CONSIDERATIONS
1 TO 2 DAYS OUT	■ Print any additional nametags	<ul style="list-style-type: none"> • <i>Stuff all nametags into sleeves (unless using stick-on)</i> • <i>Include table numbers in nametag sleeves, if applicable</i> • <i>Last minute changes</i>
	■ If possible, take event supplies to venue	<ul style="list-style-type: none"> • <i>Work with vendor to identify a space for supply storage</i>
	■ Send a reminder email to registrants	<ul style="list-style-type: none"> • <i>Remind them of all event logistics, parking, name of the space/room number, attire, and offer contact information for questions.</i>
	■ AV Test	<ul style="list-style-type: none"> • <i>Test equipment</i> • <i>Make sure AV tech is aware of cues</i> • <i>Test your actual content to ensure the correct fonts are displayed, you have the correct version, videos will play, etc.</i>
	■ Print script(s)	<ul style="list-style-type: none"> • <i>Print in large font, double spaced, one-sided</i> • <i>3-hole punch and put in folder or binder</i>
	■ Be onsite for event setup	<ul style="list-style-type: none"> • <i>Vendors will likely have setup questions</i> • <i>You may decide to alter your layout once you see everything in the space</i> • <i>You may be able to go ahead and set out signage or setup registration so that you're not doing that on event day</i>
	■ Check your packing list/event supplies	<ul style="list-style-type: none"> • <i>Ensure everything is in good shape and you have the correct quantity</i>

TASK		CONSIDERATIONS
POST - EVENT	<input type="checkbox"/> Process any unpaid invoices	
	<input type="checkbox"/> Update website with relevant info	
	<input type="checkbox"/> Unpack and inventory event supplies	<ul style="list-style-type: none"> • <i>Take nametags out of sleeves</i> • <i>Check supplies for damage</i>
	<input type="checkbox"/> Ship rental linens	<ul style="list-style-type: none"> • <i>Most companies include a return shipping label</i>
	<input type="checkbox"/> Personal outreach	<ul style="list-style-type: none"> • <i>Follow up with guests as needed</i> • <i>Thank you notes to vendors, program participants and volunteers</i>
	<input type="checkbox"/> Hold an event debrief meeting	<ul style="list-style-type: none"> • <i>Challenges with vendors or location?</i> • <i>Survey feedback</i> • <i>Unexpected outcomes (positive and negative)</i> • <i>Changes or improvements for next time</i>