

EVENT PLANNING CHECKLIST

Pre-planning

Event

Type of Event		
<input type="checkbox"/> Building Dedication	<input type="checkbox"/> Groundbreaking	<input type="checkbox"/> Ribbon Cutting
<input type="checkbox"/> Historical Marker	<input type="checkbox"/> Naming Ceremony	<input type="checkbox"/> Honorary Ceremony
<input type="checkbox"/> Other		

Sponsoring Unit

Departmental Contact		
Name		
Campus Address		
Email	Phone	Fax

Billing Information
Job Number
Account Number

Level of Service
<input type="checkbox"/> Lead Role (Coordinate the entire event)
<input type="checkbox"/> Support Role (Implement select event planning services)
<input type="checkbox"/> Subordinate Role (Provide services for other event planners)

Date of Event		
Alternative Date(s)		

Time of Event

Expected Audience

Estimated Attendance

Establish Preliminary Budget

Twelve Weeks Prior to Event

Order Plaques/Building Letters		
Contact: Facilities Planning:		
Designer		
Email	Phone	Fax
Text		
Supplier		
Service Representative		
Email	Phone	Fax
Installation Date		Specific Location
Approval	1.	2.
		3.

Order Gifts/Awards/Promotional Items		
Item		
Design		
Designer		
Email	Phone	Fax
Supplier		
Service Representative		
Email	Phone	Fax
Approval	1.	2.
		3.

Six Weeks Prior to the Event

Coordinate Calendars of Key Stakeholders	

Confirm Speakers	

Obtain/Research Names and Addresses of Guests			
Contact			
File Type	Labels Provided: <input type="checkbox"/> Yes <input type="checkbox"/> No		
Date Needed			

Save the Date Notices			
Designer			
Email	Phone	Fax	
Postcard Design			
Printer			
Service Representative			
Email	Phone	Fax	
Quantity			
Paper	Ink	Size	Order #
Approval	1.	2.	3.
Mail Date			

Secure Location			
Rain Site			

Design Invitations			
Designer			
Email	Phone	Fax	
Invitation Design			
Printer			
Service Representative			
Email	Phone	Fax	
Quantity			
Paper	Ink	Size	Order #
Inserts	<input type="checkbox"/> Map	<input type="checkbox"/> Parking Pass	<input type="checkbox"/> Reserved Seating
	<input type="checkbox"/> Reply Card/Envelope		<input type="checkbox"/> Other
Approval	1.	2.	3.

Stage Party Members			
<input type="checkbox"/> Letter inviting individuals to be part of Stage Party			
Approval	1.	2.	3.
Mail Date			
<input type="checkbox"/> Maintain RSVP List for Stage Party		<input type="checkbox"/> Final Stage Party Count	
<input type="checkbox"/> Seating Chart Diagram			
<input type="checkbox"/> Stage Party Signs for Lineup			

Room/Site Set-up	
Contact:	
<input type="checkbox"/> Stage Size	<input type="checkbox"/> Sound
<input type="checkbox"/> Podium	<input type="checkbox"/> Audiovisual Equipment
<input type="checkbox"/> Seal	<input type="checkbox"/> Screen
<input type="checkbox"/> Flags	<input type="checkbox"/> Floor Microphones
<input type="checkbox"/> Number of Stage Party Chairs	<input type="checkbox"/> Portable Microphones
<input type="checkbox"/> Number of Audience Chairs	<input type="checkbox"/> Audience Microphones
<input type="checkbox"/> Number of Reserved Chairs	<input type="checkbox"/> Press Feeds
<input type="checkbox"/> Number of Serving Tables	<input type="checkbox"/> Easels
<input type="checkbox"/> Number of Display Tables	<input type="checkbox"/> Drapes
<input type="checkbox"/> Number of Check-in Tables	<input type="checkbox"/> Signage
<input type="checkbox"/> Number of Guest Book Tables	<input type="checkbox"/> Tent
<input type="checkbox"/> Meeting Area for Stage Party	<input type="checkbox"/> Ribbon-cutting Set-up
<input type="checkbox"/> Overflow Area	<input type="checkbox"/> Unveiling Set-up
<input type="checkbox"/> Podium Greenery	<input type="checkbox"/> Water Set-up
<input type="checkbox"/> Other Greenery	<input type="checkbox"/> Other

Site Preparation
Contact: Physical Plant
<input type="checkbox"/> Work Request
<input type="checkbox"/> Sweep Street
<input type="checkbox"/> Mow
<input type="checkbox"/> Check for Fire Ants
<input type="checkbox"/> Soil for Groundbreaking

Parking/Transportation
Contact: University Police/Transportation Services
Contact: Bus Operations:
Reserved Parking Lot #
Stage Party Parking Lot #
Directional Signage
Number of Barricades Locations
Bus Operations Reservations

Security
Contact: University Police
<input type="checkbox"/> Inside <input type="checkbox"/> Outside
Number of Security Officers
Specific Location(s)

Food/Refreshments		
Contact: Food Services:		
Location		
Number of Guests		
Menu		
Number of Tables		
Number of Servers		
Tablecloths/Skirts		Colors
Centerpieces	Quantity	Colors

Photography	
Contact: Marketing & Communications	
Photographer:	Phone:
<input type="checkbox"/> Photo CD	Quantity
<input type="checkbox"/> Prints	Quantity
<input type="checkbox"/> Albums	Quantity

Videography	
Contact: Marketing & Communications	
Videographer:	Phone:
Client Copy: <input type="checkbox"/> Yes <input type="checkbox"/> No	Quantity
Archival Copy: <input type="checkbox"/> Yes <input type="checkbox"/> No	

Three Weeks Prior to the Event

Mail Invitations	
<input type="checkbox"/> Merge Mailing List	Date
<input type="checkbox"/> Address Envelopes or Labels	Date
<input type="checkbox"/> Assemble Invitations and Inserts	Date
<input type="checkbox"/> Stuff	Date
<input type="checkbox"/> Seal	Date
Stamps	Quantity
	Cost
<input type="checkbox"/> Stamp	Date
<input type="checkbox"/> Mail	Date

Develop RSVP System		
RSVP by Date		
Contact	Email	Phone

RSVP Count to:	<input type="checkbox"/> Client	<input type="checkbox"/> Caterer	<input type="checkbox"/> Theatre Complex	<input type="checkbox"/> Other
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Coordinate Speeches		
Contact: Chancellor's Office & Marketing & Communications		
Speaker		
Speaker		
Speaker		
Speaker		
Speaker		

Develop Program		
Designer:		
Email	Phone	Fax
Program Design		
Printer		
Service Representative		
Email	Phone	Fax
Quantity		
Paper Selection		Ink
Size	Fold	Order #
Program Outline		

Floral Arrangements		
Florist		
Service Representative		
Email	Phone	Fax
<input type="checkbox"/> Podium Piece		
<input type="checkbox"/> Centerpieces	Quantity	Location
<input type="checkbox"/> Corsages	Quantity	Guest(s)
<input type="checkbox"/> Boutonnieres	Quantity	Guest(s)

Special Accommodations	
Contact for list of Resources, Disability Services	
<input type="checkbox"/> Hotel	
<input type="checkbox"/> Campus Escorts	
<input type="checkbox"/> Transportation	
<input type="checkbox"/> Parking	
<input type="checkbox"/> Portable Restrooms	
<input type="checkbox"/> Disability Accessibility	
<input type="checkbox"/> Hearing Impaired	
<input type="checkbox"/> Meals	
<input type="checkbox"/> Other	

Miscellaneous Materials/Supplies	
<input type="checkbox"/> Shovels for Groundbreaking	Quantity
<input type="checkbox"/> Hardhats	Quantity
<input type="checkbox"/> Scissors for Ribbon-cutting	Quantity
<input type="checkbox"/> Stage Party List/Diagram	Quantity
<input type="checkbox"/> Stage Party Signs	Quantity

Two Weeks Prior to the Event

Publicity	
Contact: Marketing & Communications	
<input type="checkbox"/> Advance Press Release	
<input type="checkbox"/> Follow-up Press Release	
<input type="checkbox"/> Press Kits	Quantity
<input type="checkbox"/> Flyers	
<input type="checkbox"/> Paid Advertisements	
<input type="checkbox"/> Other	

Staff Assignments	
<input type="checkbox"/> Prepare detailed list of responsibilities for each role listed below.	
Assignment	Staff Member
Material Delivery	
Walk-thru	
Greeters	
Spotters	
Stage Party Check-in	
Sign-in/Registration	
Runners	

One Week Prior to the Event

Finalize and Print Program

Pack an Emergency Kit

<input type="checkbox"/> First Aid Kit	<input type="checkbox"/> Paper	<input type="checkbox"/> Phone Numbers
<input type="checkbox"/> Scissors	<input type="checkbox"/> Tape	<input type="checkbox"/> Other
<input type="checkbox"/> Pens	<input type="checkbox"/> Stapler	<input type="checkbox"/> Other
<input type="checkbox"/> Pencils	<input type="checkbox"/> Paper Clips	<input type="checkbox"/> Other

Confirm

<input type="checkbox"/> Facility Set-up	<input type="checkbox"/> Parking
<input type="checkbox"/> Equipment	<input type="checkbox"/> Transportation
<input type="checkbox"/> Security	<input type="checkbox"/> Security
<input type="checkbox"/> Catering	<input type="checkbox"/> Photos
<input type="checkbox"/> Floral	<input type="checkbox"/> Video
<input type="checkbox"/> Stage Party	<input type="checkbox"/> Other

Day Prior to the Event

Deliver all Materials to Venue

Confirm Staff Assignments

Day of the Event

Meet with Staff and Review Assignments

Date	Time	Location
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Walk Through Location

<input type="checkbox"/> Verify room layout
<input type="checkbox"/> Verify seating for Stage Party
<input type="checkbox"/> Other
<input type="checkbox"/> Other

Check Directional Signage

Follow-up After the Event

Send Photo Gallery to Client

Date Sent	Date Selections Received
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Assemble /Deliver Albums

Date Assembled	Date Delivered
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Invoice Client	
<input type="checkbox"/> Estimate Prepared/Submitted	<input type="checkbox"/> Estimate Approved
Date Invoiced	Date Payment Received

Committee/Client Debriefing		
Date	Time	Location
Notes		

Evaluation
<input type="checkbox"/> Mailed
<input type="checkbox"/> Returned
<input type="checkbox"/> Compiled

Thank You Notes
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>