

# Event Planning Checklist and Timeline

## Pre-Planning Meeting

- Brainstorm the theme** of your event programming, décor and other details.
  - Make a list of your desired event speakers, performers or special guests
- Reserve your event** to include as many details as possible: date, time, location, resources, estimated guest count, catering needs, set-up needs, etc.
- Start a budget** to include everything from venue fees, insurance, catering, décor, etc.
  - You can get quotes and estimates from vendors as a starting point.
- Determine additional needs:**
  - Campus Security may require you to hire additional security depending on scale and activity.
  - Liability insurance is required for any third party clients, vendors, contractors, etc. If you are unsure, please contact the Office of University and External Events.
  - General parking and/or valet parking, shuttle service and other special requests for parking and transportation.

## 14 Weeks Out

- Contact and/or book security and parking**
  - Send a memo to notify security and parking of your event to include full details. During this time, security and parking will confirm if you will need to arrange for dedicated security officers and which parking lot to direct your attendees.
- Place orders or requests:**
  - Catering
  - Entertainment / Performers / Speakers

## 12 Weeks Out

- Decide on printed materials**
  - Invitation sets / mailers
  - Programs / menus
  - Posters / Promotional Flyers / Banners
  - Nametags / Table Tents
- Send save the dates to print and complete mailing list**
- Update event collateral**
  - Event website to include schedule, speakers, special guests, etc.
- Mail / Email out save the dates**
- Create your promotional plan** ie. Social media, media releases

## 10 Weeks Out

- Call for volunteers**
- Book media services (audio/visual)**
- Place order for décor and rentals**
- Book photographer**

## 8 Weeks Out

- Arrange for attendee and special guest transportation**
- Draft scripts and run of show**
- Send invitations to print**

## 6 Weeks Out

- Mail / Email out invitations
- Event related printed materials goes into production (banners, posters, programs, etc)

## 4 Weeks Out

- Create a detailed timeline of the event program
- Assign staff and volunteer duties

## 2 Weeks Out

- Create and finalize seating chart / layout
- Meet with upper management, necessary VIPs
  - Review scripts, run of show and seating chart
- Send programs to print
  - Along with any "event day" pieces (table numbers, name cards, menus, etc.)
- Meet with Volunteers for training
- Create a shot list for photographer

## 1 Week Out

- Finish any in-house printing
- Assemble registration table materials
- Schedule setup for tables, chairs, A/V, and floral
- Send final RSVP count to catering
  - Include number of meat, vegetarian, special dietary restriction options
- Complete seating chart
  - Send to caterer if necessary
- Final meeting with event committee
  - Ensure everything is on track
- Check weather forecast
  - If event is outdoors, monitor all week leading up to the event

## Day Before

- Print final scripts and run of show
- Create and print out contact list to include cell phone numbers of all staff and vendors working the event
- Collect event day materials
- Early delivery and setup (If possible)

## Day Of

- Oversee setup
  - A/V and stage
  - Tables/Chairs
  - Floral
- Place programs / menus at tables and scripts on podium
  - Verify there are no last minute changes to script
- Set-up registration / check-in
- Set-up VIP and/or speaker green room
- Brief volunteers on duties and alert them of any changes
- Venue Walkthrough to make sure everything is prepared for your event

## Post-Event

After the event, it is always a good idea to evaluate and take notes on how the event went, what could be improved and how you would do things differently next time. You should have a post event debrief meeting with key players involved in the planning and implementation of the event.

Make a note to collect the following information to reference for future planning:

- Final budget
- Invoices for any expenses
- Script or production notes
- Promotional materials, like posters or flyers
- Meeting notes and important emails
- Event set-up and layouts
- Completed checklist
- Security plan
- Day-of notes and materials
- After-action notes