Event Detailed Checklist

This checklist should be used in conjunction with the Event Planning Timetable. This is just the details of the steps that will help plan your event. Please see the rest of toolkit to further develop parts of this checklist.

Scheduling (people to consider and confirm with while establishing a possible date)

- □ Host
- □ Speaker
- □ President (and spouse)
- □ Vice President(s)
- □ Cabinet
- □ Deans
- □ School Chairs
- □ Chairman
- □ Faculty
- □ Key Staff
- □ Student Representative
- □ Location availability
- □ School/National calendars

Invitations

- □ **Design**- remember this is your first impression of event
- □ **Guest List**
  - o Entity/couple invitations
  - o University Heads
  - o Faculty/ Staff
  - o Student representatives
  - o Non-affiliates invitees
    - Ensure correct salutation
    - Ensure correct Spousal/family names
  - o Make sure all deans, school chairs, and appropriate hierarchy is invited
- □ **Invitation Medium**
  - o Formal printed
  - o Personal Letter
  - o Email
  - o Other

- □ **For Person/Department issuing invitation**
  - o Method of response
  - o Response piece included in invitation
  - o Phone (special line?)
  - o E-mail (link to website?)
  - o Fax/Other means
- □ **Receiving RSVPs**
  - o Acceptance calls (use log to keep track)
  - o Hospitality Resource sheet
    - ▪ Hotel blocks
    - ▪ Airline schedules
    - ▪ Car rental/limousine service
    - ▪ Down-time events (such as tours of campus, city, etc.)
- □ **Follow-up Calls to non-respondents**

Event Location

- □ Availability
- □ Site visit prior to booking
- □ Proximity to institute, guests
- □ Deposits/room fees
- □ Maximum capacity
- □ Catering or dining resources
- □ Handicap access
- □ Security
- □ Parking (valet/ample space, etc.)
- □ Coat check
- □ Green/prep room

Catering

- □ **Facility resources**
  - • Floor plan
  - • Lighting
- □ **Menu Logistics**
  - • Type of service
  - • Theme of menu/table presentation
  - • Special dietary needs

- ☐ **Alcohol policy**
- ☐ **Meals for staff**

Event Publicity/ Marketing

- ☐ Fact Sheet
- ☐ Press release
- ☐ Pre-event mailers "hold the date"
- ☐ Email notifications (website)
- ☐ Calendar listings
- ☐ Other

Program Scheduling and Content

- ☐ **Table/ Seating Assignments**
  - Develop seating style/floor chart
  - Seating oversight facilitator
  - Staff and Student seating
- ☐ **Program Material**
  - Printed program
  - Name tags
  - Place cards
  - Table Numbers (along with a master list for greeters to let guest know)
  - Menu Cards
  - Handouts
  - Promotional Items

Photographer

- ☐ Booking and confirmation
- ☐ Photo request list
- ☐ Videographer
- ☐ Rights to use the images

Audiovisual Equipment

- ☐ Determine A/V needs (be sure to check with presenters as to what they will need

Floral Needs

- □ Flower variation and color
- □ Variety of services (setup, take-down, etc.)
- □ Table arrangements
- □ Lighting (provide candles?)
- □ Take home gift (good way to get rid of centerpieces at end of night. Try putting a sticker under teacup to see who at the table gets to take the centerpiece home

Music/ Entertainment

- □ Type
- □ Venue approval (hours, volume, etc.)
- □ Booking and confirmation

Speakers

- □ Confirm speakers
- □ Gather speaker biography
- □ Speaker topic (get outline or slides in advance)
- □ Speaker introduction
- □ Gift to thank speaker(s)

Supplementary Staffing (will need people to fill the following posts)

- □ Registration
- □ Greeters/ Host
- □ Errand runners