Event Planning Checklist

Event Name: ____________________________

Date: _________________________________

Time: _________________________________

Location: ______________________________

Purpose and Benefit: ___________________

Approved Cost Center ____________________

BRAINSTORMING
- How many people do you need to make the event happen?
- Do we have the resources to make it happen?

PRE 8 WEEKS
- Create a budget □
- Pick a date and confirm it does not conflict with other events □
- Submit Official Functions form □
- Get approval from sponsor, if relevant □
- Reserve a location for the event □
- Confirm date with speaker □
- Determine preliminary guest list □
- Anticipated number of participants/guests □

8 WEEKS PRIOR

Scheduling:
- Schedule travel arrangements for speaker, if necessary (airfare, hotel, taxi) □
- Secure bio and photo of speaker □
- Submit Presidential attendance/participation request form (if needed) □

Advertising:
- E-mail blast to announce the event/save the date □
- Post event date on all Bauer calendars (online) □
- Secure photographer and videographer □
- Create posters/flyer for distribution □

7 WEEKS PRIOR
- Request online registration form thru BDOT (Bauer IT) □
- Create and send electronic invitations □
- Create PowerPoint for video wall □
- Prepare Bauer/BCAA comm. Materials for display □

6 WEEKS PRIOR
- Order awards/promo items for speaker and/or guests □

5 WEEKS PRIOR

Permits:
- Alcohol permit submitted (as necessary) □
- Parking lot permit/reservation □
- Security scheduled (form to complete and submit for approval via UHDPS) □

4 WEEKS PRIOR
- Secure 3 quotes for catering & select caterer □
- Reserve tables via BOSS request (Events Setup category) □
- Order linens □
- Order decorations (flowers) □
- Order supplies (gift bags, etc.) □
- Request for extra trash bins if needed □
- Request AV equipment via BOSS request □
- Collect RSVP’s □
- External guest list (to account for parking needs) □

3 WEEKS PRIOR
- Send request to students for volunteering □
- Request podium for reception, as needed □
- Request wireless microphone, if needed □

2 WEEKS PRIOR
- Send parking instructions to guests □
- Submit FAMIS Work Order (for Event Support w/ Cost Center) to request room be cleaned after event (floors vacuumed and trash emptied)

1 WEEK PRIOR
- Print registration list □
- Create/assemble name badges □

DAY OF EVENT
- Walk thru of AV equipment with BDOT □
- Print final registration list (including any additions/changes) □

POST EVENT
- Send invoices to proper person for payment □
- Send thank you letters/cards to guests and speaker □
- Assessment of event (via staff meeting) - What went well, what needs adjusting for next event □