

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