

Event Title _____

Event Sponsor _____

Contact Name _____ Department _____

Phone _____ Fax _____ Email _____

Account Number / Funding Source _____

Event Location _____ Room Number _____

Event Date _____ Start Time _____ End Time _____

Date Reserved _____ Date Confirmed _____

4-6 Months Prior

| Task | Comments | Notes |
|--|--|-------|
| Convene committee for pre-planning meeting | | |
| Determine goals and purpose of event | <ul style="list-style-type: none"> Who is your target audience for the event? What are your learning objectives, if applicable? What do you hope to accomplish? | |
| Select a date and time | <ul style="list-style-type: none"> Ensure hosts, VIPs (president, board of trustees, provost, vice presidents, deans, athletic director, additional boards, etc.) and/or speakers are available for specified dates. Place a hold on administrator's calendars. Determine if VIP's spouse will be invited and ensure he/she can attend. Consult campus calendar, religious calendars and community events calendars when selecting Think of campus culture/workday schedule when selecting times | |

| | | |
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| Set budget | Research potential funding source | |
| Select and reserve venue | <p>Remember to review:</p> <ul style="list-style-type: none"> • A/V capabilities • Parking availability/restrictions • Maximum capacities • Other events occurring near space—will they conflict? • Accessibility—how will people with disabilities enter the venue? • Access times to space • Load-in/delivery capabilities • Included equipment with room rental • Surrounding sound impediments • Security issues | |
| Schedule a rain plan, if applicable | <ul style="list-style-type: none"> • Select venue • Determine who will make the rain plan call • Determine how and when you will communicate the rain location to your guests • As soon as rain plan is established, consider additional needs to accommodate the plan (i.e. different staff, vendors, rental equipment, etc.) | |
| Determine guest list | <ul style="list-style-type: none"> • The Office for Philanthropy can assist in pulling guest lists for events. Establish your list criteria prior to contacting Philanthropy | |
| Investigate needs for special permits, licenses, insurance, etc. | | |
| Create a time line and delegate duties | | |
| Reserve hotel, plane and travel accommodations for speakers/VIPs and staff, if applicable | <ul style="list-style-type: none"> • Ensure hotel room blocks have multiple options and are accessible for guests • Send hotel contract to Procurement and Risk Management for approval/signatures | |
| Select and book caterer | <ul style="list-style-type: none"> • Do any of your guests have dietary needs? • Remember vegetarian options • Will you need linens from the caterer or other rental company? • Remember waters for the podium and/or bottled water for guests, if applicable • Gain menu approval from event hosts/committee | |

2-3 Months Prior

| Task | Comments | Notes |
|---|---|-------|
| Send Save the Dates | | |
| Design create/order invitations | <ul style="list-style-type: none"> See Invitation Etiquette .pdf | |
| Secure entertainment/musicians | <ul style="list-style-type: none"> Think about all aspects of the event (guest arrival, duration of event, etc.) Send contract to Procurement and Risk Management for approval signatures | |
| Begin designing printed pieces (i.e. invitations, tickets, flyers, programs, pamphlets, etc.) | | |
| Develop a press release, if applicable | <ul style="list-style-type: none"> Solicit the help of University Communications in developing a press release | |
| Request and receive speakers'/VIPs' bios | <ul style="list-style-type: none"> Ask for photo if included in program—high res jpeg | |
| Request participation of additional speakers | <ul style="list-style-type: none"> Emcees, presenters, etc. Always have someone introduce the President | |
| Order rental equipment | <ul style="list-style-type: none"> Tables, chairs, stage, specialty linens, patio heater, tent, dance floor, pipe and drape, etc. | |
| Research/order give-aways or awards/plaques | <ul style="list-style-type: none"> Ensure that the vendor is licensed with the University (check with Trenny Neff in University Communications) | |

4-6 Weeks Prior

| Task | Comments | Notes |
|---|--|-------|
| Create a spreadsheet from invitation list to enter responses | | |
| Secure permits and insurance | | |
| Release press announcements to local print media | <ul style="list-style-type: none"> Work with Martha Hunn in University Communication to coordinate | |
| Arrange for transportation (buses, shuttles) if necessary | | |
| Determine parking and obtain directional maps for visitors to include with invitation | <ul style="list-style-type: none"> Complete a "Service Request" on Public Safety's website Faculty and Staff designated areas are opened after 5 p.m. and can be used for event parking. | |

| | | |
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| Inform Public safety of needed parking and possible on-site officers to direct traffic | <ul style="list-style-type: none"> • A cross-guard officer needs to be requested if guests are being asked to cross a main street to get to the event location | |
| Order speaker gifts | | |
| Request CCU traditional aspects, if needed | <ul style="list-style-type: none"> • Chauncey the mascot • Spirit of the Chanticleer Marching Band • Cheerleaders • Dance Team | |
| Meet with the florist regarding centerpieces | <ul style="list-style-type: none"> • Take a swatch of the linen you will be using | |
| Arrange to have a photographer at the event | <ul style="list-style-type: none"> • Work with Bill Edmunds in University Communications to coordinate | |
| Confirm order of program and ensure all who have a speaking part have a copy of the order of the program | | |
| Order programs | | |
| Arrange additional volunteers/ students workers | <ul style="list-style-type: none"> • Volunteers can help with nametag table, serve as golf cart drivers, etc. | |
| Assemble/address invitations | | |
| Mail invitations | <ul style="list-style-type: none"> • "Reply by" — one week prior to event | |
| Determine if signage needs to be produced, order signage and large promotional material | | |
| Schedule a walk-through with major stakeholders, committee members and volunteers to ensure all needs are met | | |
| Create a list of needs and then place work orders | <ul style="list-style-type: none"> • On-campus work orders can be placed at myschoolbuilding.com • Directional signs, custodial, grounds, event set-up, electrical, etc. • Contact Sandi Hatcher regarding questions related to work orders | <ul style="list-style-type: none"> • <i>Tables/chairs and AV needs must be requested when making the room reservation</i> |

1-2 Weeks Prior

| Task | Comments | Notes |
|--|--|-------|
| Arrange with University Communication to assist with scripting | <ul style="list-style-type: none"> • Work with Martha Hunn in University Communication • For President and other VIPs, clearly mark each time they speak with dividers in the script book • Request scripts from all participants with a talking role so you can compile a complete script book • Include phonetic spellings for any individuals' names that might be difficult to pronounce | |
| Prepare a room diagram staging, seating, buffets or stations, entertainment, etc. | <ul style="list-style-type: none"> • Room diagrams are useful to give to facilities and rental companies to ensure all equipment is set-up in the proper place • Remember to bring Room Diagram to seating meeting | |
| Follow-up with invitation/RSVP list. Make personalized phone calls and emails, if necessary. | | |
| Send final numbers to the caterer | | |
| Set meeting to brief President | <ul style="list-style-type: none"> • Brief him on updated attendee list and the evenings time line | |
| Schedule a seating meeting | <ul style="list-style-type: none"> • Be sure to bring the RSVP list and the room diagram | |
| Create detailed hour-by-hour event agenda (event plan) for set-up, volunteers and vendors. | | |
| Confirm set-up/breakdown with all vendors | | |
| Wrap gifts | | |
| Distribute parking passes | | |
| Send completed schedule of events and scripts to VIPs that will have a speaking role. | <ul style="list-style-type: none"> • Include a reminder with the walk-through date | |
| Send final information to participants including directions, maps, last minute details, etc. | | |

1-2 Days Prior

| Task | Comments | Notes |
|---|---|-------|
| Hold a seating meeting to determine where each guest will sit | <ul style="list-style-type: none"> Head tables and guests with speaking roles should be seated near the stage. | |
| Create a final to-do list to determine if all tasks are completed | | |
| Purchase flowers for arrangements if not provided | | |
| Recheck all equipment/materials to ensure nothing is damaged, quantity is correct, etc. | | |
| Reconfirm schedule with caterer | | |
| Decorate room if desired | | |
| Display parking/directional signs | | |
| Discuss rain plan logistics | | |
| Conduct a walk-through | | |
| Form an attendee spread sheet that can be used to check guest in and to make nametags | | |
| Design and print nametags/ lanyards of attendees and extra plain ones for last minute additions | <ul style="list-style-type: none"> Suggest Avery 8395 Nametag template Preferred template - Arial Bold, First name centered 54 pt; last name underneath in 48 pt Consider purchasing a machine for on-site nametags (vendor: PC nametags) Table numbers can be printed on the backs of nametags | |
| Design and print table numbers, if needed for assigned seating | | |
| Create "Event Day Survival Kit" full of needed items: pens, sharpies, tape, scissors, copies of script, volunteer assignments, etc. | | |
| Send final script, guest list, seating assignments and event schedule to the President | | |
| Ensure all appropriate contacts' info is listed where you can easily retrieve it | | |

Day of Event

| Task | Comments | Notes |
|---|---|-------|
| Arrive early and do one last walk-through | | |
| Oversee vendor set-up | | |
| Ensure all VIP materials are correctly labeled and in place | <ul style="list-style-type: none"> Provide a program to President and VIPs so they know speaking order | |
| Check all set-ups | | |
| Ensure waters are on stage and accessible to the speakers | | |
| Place nametags/Set-up registration area | | |

Up to a Week After Event

| Task | Comments | Notes |
|--|---|-------|
| Send thank you notes | | |
| Handle invoices | | |
| Hold post-event meeting with key players to evaluate event | <ul style="list-style-type: none"> Complete a post-event evaluation to record your ideas and lessons learned | |
| Send pictures/mementos to VIP guest | | |
| Pack up and inventory all materials | | |
| Update website | | |
| Book next year's venue, for annual event | | |

