

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 | Contacts |
|---|--|----------|
| <input type="checkbox"/> Convene committee for pre-planning meeting | | |
| <input type="checkbox"/> 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? | |
| <input type="checkbox"/> Select a date and time | <ul style="list-style-type: none"> • Ensure hosts, VIPs (<i>president, board of trustees, honoree, provost, vice presidents, deans, athletic director, additional boards, etc.</i>) and/or speakers are available for specified dates. Place a hold on administrator's calendars. • Determine if spouses will be invited and ensure they can attend. • Consult campus calendar, religious calendars and community events calendars when selecting. • Think of campus culture/workday schedule when selecting times. | |
| <input type="checkbox"/> Set budget \$ _____ | <ul style="list-style-type: none"> • Research potential funding source | |

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| <input type="checkbox"/> 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 | <ul style="list-style-type: none"> • Room needs to be reserved and AV requested through 25Live. Contact the Office of Scheduling and Event Services for assistance in working in 25Live. • A Guide to scheduling spaces and reserving resources with 25Live. |
| <input type="checkbox"/> 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.). | |
| <input type="checkbox"/> 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. | <p>Brian Rothenberger Director of Operations 843-349-2012 brianr@coastal.edu</p> |
| <input type="checkbox"/> Investigate needs for special permits, licenses, etc. | <ul style="list-style-type: none"> • Mainly applicable for events off campus. | |
| <input type="checkbox"/> Create a time line and delegate duties | | |
| <input type="checkbox"/> 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. • Have hotel give code word for block and pass along to guest via save the date/invitation. • Send hotel contract to University Counsel and Procurement for approval/signatures. | |
| <input type="checkbox"/> Select and book a 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 water for speakers at lectern. • Gain menu approval from committee. | <p>Jenn Frederickson Catering Sales, Aramark 843-349-2422 frederickson-jennifer@aramark.com</p> |

2-3 Months Prior

| Task | Comments | Contacts |
|--|---|--|
| <input type="checkbox"/> Send Save the Dates | | |
| <input type="checkbox"/> 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 University Counsel and Procurement for approval and signatures. Certificate of insurance will be required for anyone playing on campus. For assistance in acquiring a certificate of insurance contact the Office of Risk Management and Insurance Services. | <p>Rose Marie Johnson Coordinator of Risk Management and Strategic Planning 843-349-6448 mj@coastal.edu</p> <p>Russell Tyler Coordinator of Insurance Services 843-349-2125 rrtyler@coastal.edu</p> |
| <input type="checkbox"/> Begin designing printed pieces (i.e. invitations, tickets, fliers, programs, pamphlets, etc.) | <ul style="list-style-type: none"> The Office of University Communication's design team is available to assist in the design and production of publications, advertising and most collateral print needs. All self-produced collateral must be submitted to editor@coastal.edu for review and approval by University Communications before printing. Please see Proofing Guidelines for additional information. See Invitation Etiquette | <p>Please fill out the University Communications/ Printing Services Requisition form, and submit all design requests to graphics@coastal.edu.</p> |
| <input type="checkbox"/> Develop a press release, if applicable | <ul style="list-style-type: none"> Solicit the help of University Communications in developing a press release. | <p>Caroline Rohr Media Relations Coordinator 843-349-6524 cpsmith1@coastal.edu</p> |
| <input type="checkbox"/> Request and receive speakers'/ honorees bios | <ul style="list-style-type: none"> Ask for photo if included in program—high resolution jpeg | |
| <input type="checkbox"/> Request participation of additional speakers | <ul style="list-style-type: none"> Emcees, presenters, etc. Always have someone introduce the President | |
| <input type="checkbox"/> Order rental equipment | <ul style="list-style-type: none"> Tables, chairs, stage, specialty linens, patio heater, tent, dance floor, pipe and drape, etc. | |
| <input type="checkbox"/> Research/order give-aways or awards/plaques | <ul style="list-style-type: none"> Ensure that the vendor is licensed with the University. CCU Licensee List CCU Trademark and Licensing | <p>Trenny Neff Coordinator of Advertising & Trademark Management 843-349-2102 tneff@coastal.edu</p> |

4-6 Weeks Prior

| Task | Comments | Contacts |
|---|---|---|
| <input type="checkbox"/> Create a spreadsheet from invitation list to enter responses | | |
| <input type="checkbox"/> Release press announcements to local media | <ul style="list-style-type: none"> Work with University Communication to coordinate | <p>Caroline Rohr Media Relations Coordinator 843-349-6524 cpsmith1@coastal.edu</p> |
| <input type="checkbox"/> Arrange for transportation (buses, shuttles) if necessary | <ul style="list-style-type: none"> Fill out a Bus Reservation Request Form | |
| <input type="checkbox"/> 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. | |
| <input type="checkbox"/> 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 | |
| <input type="checkbox"/> Order speaker gifts | <ul style="list-style-type: none"> Order/purchase speaker/honoree gift. | |
| <input type="checkbox"/> Request CCU traditional aspects, if needed | <ul style="list-style-type: none"> Chauncey the mascot Spirit of the Chanticleer Marching Band Cheerleaders Dance Team | |
| <input type="checkbox"/> Meet with the florist regarding centerpieces | <ul style="list-style-type: none"> Take a swatch of the linen you will be using. | |
| <input type="checkbox"/> Arrange to have a photographer and/or videographer at the event | <ul style="list-style-type: none"> Submit a request for photographer to ccuphoto@coastal.edu. Videographer request must be submitted at myschoolbuilding.com. Requests should include event name, start time, end time, location, and contact information. | |
| <input type="checkbox"/> Confirm order of program and ensure all who have a speaking part have a copy of the order of the program | | |
| <input type="checkbox"/> Send program to the printers | | |
| <input type="checkbox"/> Arrange additional volunteers/ students workers | <ul style="list-style-type: none"> Volunteers can help with name tag table, serve as golf cart drivers (must have completed golf cart training), etc. | |

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| <input type="checkbox"/> Assemble/address invitations | | |
| <input type="checkbox"/> Mail invitations | <ul style="list-style-type: none"> • “Reply by” — one week prior to event | |
| <input type="checkbox"/> Determine if signage needs to be produced, order signage and large promotional material | <ul style="list-style-type: none"> • A work order must be placed through myschoolbuilding.com. | <p>Robert “Bob” Burns Sign Shop Supervisor 843-349-2608 rburns@coastal.edu</p> |
| <input type="checkbox"/> 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. • Custodial, grounds, event set-up (include a diagram of the room), electrical, recycling, greenery (palms, ferns, small floral arrangements), etc. • <i>Note: AV needs must be requested when making the room reservation in 25Live.</i> | <p>John Brong Greenhouse 843-349-3400 jbrong@coastal.edu</p> <p>Jeremy Monday Custodial Services/ Sustainability 843-349-6954 jmonday1@coastal.edu</p> <p>General Work Order Inquiries: Wendy Singleton Facilities Planning & Management 843-349-2650 wsinglet@coastal.edu</p> |

1-2 Weeks Prior

| Task | Comments | Contacts |
|--|---|---|
| <input type="checkbox"/> Decide on talking points for each presenter, and then formulate the script for the event. | <ul style="list-style-type: none"> • University Communication is available to assist with script writing. • For President and other VIPs, clearly mark each time they speak with dividers in the script book • Request scripts from all participants with a speaking role so you can compile a complete script book • Include phonetic spellings for any individuals’ names that might be difficult to pronounce. | <p>Melanie Smith Internal Communications Coordinator 843-349-2087 msmith18@coastal.edu</p> |
| <input type="checkbox"/> 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. | |

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| <input type="checkbox"/> Follow-up with invitation/RSVP list. Make personalized phone calls and emails, if necessary. | | |
| <input type="checkbox"/> Send final numbers/guest count to the caterer | | |
| <input type="checkbox"/> Set meeting to brief President | <ul style="list-style-type: none"> Brief him on updated attendee list, the evenings time line, and script. | Jennifer Packard <i>Senior Administrator Coordinator, President's Office</i> 843-349-2002 jpackard@coastal.edu |
| <input type="checkbox"/> Create detailed hour-by-hour event agenda for set-up, volunteers and vendors. | | |
| <input type="checkbox"/> Confirm set-up/breakdown with all vendors | | |
| <input type="checkbox"/> Wrap gifts | | |
| <input type="checkbox"/> Distribute parking passes and/or credentials | | |
| <input type="checkbox"/> Send completed schedule of events, scripts, and updated guest list to VIPs that will have a speaking role. | | |

1-2 Days Prior

| Task | Comments | Contacts |
|--|---|----------|
| <input type="checkbox"/> 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. | |
| <input type="checkbox"/> Create a final to-do list to determine if all tasks are completed | | |
| <input type="checkbox"/> Purchase flowers for arrangements if not provided | | |
| <input type="checkbox"/> Recheck all equipment/materials to ensure nothing is damaged, quantity is correct, etc. | | |
| <input type="checkbox"/> Reconfirm schedule with caterer | | |
| <input type="checkbox"/> Decorate room if desired | | |

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| <input type="checkbox"/> Display parking/directional signs | | |
| <input type="checkbox"/> Check the weather | | |
| <input type="checkbox"/> Conduct a walk-through | | |
| <input type="checkbox"/> Form an attendee spread sheet that can be used to check guests in and to make name tags | | |
| <input type="checkbox"/> Design and print name tags/ lanyards of attendees and extra plain ones for last minute additions | <ul style="list-style-type: none"> • Suggest Avery 8395 Name tag template • Consider purchasing a machine for on-site name tags (vendor: PC name tags) • Table numbers can be printed on the backs of name tags | |
| <input type="checkbox"/> Design and print table numbers, if needed for assigned seating | | |
| <input type="checkbox"/> Create "Event Day Survival Kit" | <ul style="list-style-type: none"> • Items: pens, sharpies, tape, scissors, copies of script, volunteer assignments, etc. | |
| <input type="checkbox"/> Email final script, guest list, seating assignments and event schedule to the President . | | |
| <input type="checkbox"/> Ensure all appropriate contacts' info is listed where you can easily retrieve it | | |

Day of Event

| Task | Comments | Contacts |
|--|---|----------|
| <input type="checkbox"/> Arrive early and do one last walk-through | | |
| <input type="checkbox"/> 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 are reminded of the speaking order. | |
| <input type="checkbox"/> Check all set-ups | | |
| <input type="checkbox"/> Ensure waters are on stage and accessible to the speakers | | |
| <input type="checkbox"/> Place name tags/set-up registration area | | |
| <input type="checkbox"/> Ensure all work orders have been completed | | |

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| <input type="checkbox"/> Place reserved signs on chairs | <ul style="list-style-type: none"> • Reserve the first row of chairs for guests with speaking roles, and then reserve additional rows for speakers' guest and honorees. | |
| <input type="checkbox"/> Conduct a sound check and test any technology being used | <ul style="list-style-type: none"> • Conduct a sound check determine the desired volume. • Test any powerpoints and/or videos that will be presented. • Test any music either live or canned music. | |

Up to a Week After Event

| Task | Comments | Contacts |
|---|--|----------|
| <input type="checkbox"/> Send thank you notes | | |
| <input type="checkbox"/> Process invoices | | |
| <input type="checkbox"/> 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. | |
| <input type="checkbox"/> Send pictures to speakers/ honorees | | |
| <input type="checkbox"/> Pack up and inventory all materials | | |
| <input type="checkbox"/> Book next year's venue, for annual event | | |

