

# Event Planning Checklist

## Initial Planning – 15 Weeks Prior

Task	Comments	Completed
Convene stakeholders for pre-planning meeting		
Determine goals and purpose of event	<ul style="list-style-type: none"> <li>Who is your target audience for the event?</li> <li>What do you hope to accomplish?</li> <li>How will you gauge effectiveness?</li> </ul>	
Select date and time	<ul style="list-style-type: none"> <li>Ensure hosts, VIPs and/or speakers are available for specified dates</li> <li>Consult campus calendar/religious calendars when selecting</li> <li>Think of campus culture/workday schedule when selecting times</li> </ul>	
Set budget	<ul style="list-style-type: none"> <li>Consider various expenses including room rental fees, equipment rental fees, and catering, linen and décor costs.</li> </ul>	
Research potential funding sources	<ul style="list-style-type: none"> <li>Could you partner with any other departments/sponsors?</li> </ul>	
Select and reserve space	<p>Remember to review:</p> <ul style="list-style-type: none"> <li>Will you need a rain plan?</li> <li>A/V capabilities</li> <li>Parking availability/restrictions</li> <li>Maximum capacities</li> <li>Other events occurring near space – will they conflict?</li> <li>Accessibility – how will persons with disabilities enter the venue?</li> <li>Access times to space</li> <li>Load-in/delivery capabilities</li> <li>Included equipment with room rental</li> <li>Surrounding sound impediments</li> <li>Security issues</li> </ul>	
Schedule rain plan, if applicable	<p>Remember to review:</p> <ul style="list-style-type: none"> <li>Determine who will make the rain plan call</li> <li>Determine how and when you will communicate the rain location to your guests</li> <li>As soon as rain plan is established, consider additional needs to accommodate the plan (i.e. different staff, vendors, rental equipment, etc.)</li> </ul>	
Ensure inclusivity and sustainability	<ul style="list-style-type: none"> <li>Consult the ADA's guide to Making Temporary Events Accessible to People with Disabilities</li> </ul>	
Develop communications plan	<ul style="list-style-type: none"> <li>What is your event's main message?</li> <li>Determine what and when communications will be sent</li> </ul>	
Determine guest list	<ul style="list-style-type: none"> <li>Confirm any special needs</li> </ul>	
Investigate needs for special permits, licenses, insurance, etc.		
Research potential vendors	<ul style="list-style-type: none"> <li>Consult the Purchasing website for Marquette University approved vendors</li> </ul>	

## Confirming Event Details – 12 Weeks Prior

Task	Comments	Completed
Update any website material	<ul style="list-style-type: none"> <li>• Include accessibility information and resources, in addition to ensuring the site is accessible</li> </ul>	
Add event to campus calendar and discuss other internal promotion opportunities		
Contact Parking Services	<ul style="list-style-type: none"> <li>• Parking Services Office:</li> <li>• Ensure transportation options are accessible for guests</li> <li>• Purchase chaser tickets if necessary</li> </ul>	
Create timeline and delegate duties		
Schedule photographer and/or videographer	<ul style="list-style-type: none"> <li>• Consult the Office of Marketing and Communication</li> </ul>	
Set promotion/marketing schedule		
Order/design Save-the-Date cards or design emails		
Determine if large-scale promotional items will need to be designed and made (i.e. large signs, posters, etc.)		
Begin researching travel arrangements and hotel options		

## Working with Outside Groups/Vendors – 8-10 Weeks Prior

Task	Comments	Completed
Reserve hotel, plane and travel accommodations for speakers/VIPs and staff, if applicable	<ul style="list-style-type: none"> <li>• Ensure hotel room blocks have multiple options and are accessible for guests</li> <li>• Thoroughly review hotel contract for attrition clauses</li> </ul>	
Secure A/V needs for event	<p>Remember to review:</p> <ul style="list-style-type: none"> <li>• Lighting</li> <li>• Supplemental video needs</li> <li>• Sound – Microphones, speakers</li> <li>• Ensure you have wireless advancer, if using ppt and LCD projector/screen available</li> <li>• Ensure you have on-site A/V tech for event</li> <li>• Ensure you provide video specs to any presenter</li> <li>• TIP: Provide your speakers with ppt template already formatted/branded to your event</li> </ul>	
Design and create/order invitations	<ul style="list-style-type: none"> <li>• Always ask for dietary and special needs</li> <li>• Include relevant parking and directional information</li> </ul>	
Select & book caterer	<p>Remember to review:</p> <ul style="list-style-type: none"> <li>• Do any of your guests have dietary needs?</li> <li>• Remember vegetarian options</li> <li>• Determine VIP's preferences</li> <li>• Remember waters for the podium and/or bottled for guests, if applicable</li> <li>• Think through service expectations – Beverage service, when do you expect tables to be cleared, etc.</li> </ul>	

Secure entertainment/musicians	<ul style="list-style-type: none"> <li>Think about all aspects of the event (guest arrival, duration of event, etc.)</li> </ul>	
Begin designing printed pieces (i.e. invitations, tickets, flyers, programs, pamphlets, etc.)		
Send Save-the-Date		
Schedule supplemental staffing	<ul style="list-style-type: none"> <li>Greeters, crowd management, etc.</li> </ul>	
Request participation of additional speakers	<ul style="list-style-type: none"> <li>Emcees, presenters, etc.</li> </ul>	
Order additional décor/giveaway items	<ul style="list-style-type: none"> <li>Carpeting</li> <li>Balloons</li> <li>Marquette branded items</li> </ul>	
Consider reserving additional set-up materials	<ul style="list-style-type: none"> <li>Rental chairs</li> <li>Stage</li> <li>Podiums</li> <li>Tables</li> <li>Easels</li> <li>Coat racks</li> <li>Heat lamps</li> </ul>	
Choose menu		
Release press announcements to national and local print media	<ul style="list-style-type: none"> <li>Work with the Office of Marketing and Communication if applicable</li> </ul>	
Order any giveaways	<ul style="list-style-type: none"> <li>Consider partnering with others to share costs</li> <li>Do not include a date, if possible, so item can be reused</li> </ul>	
Arrange for transportation (buses, shuttles, valet) if necessary	<ul style="list-style-type: none"> <li>Local companies include Go Riteway, Blackline Limousine, and Keehn's Valet Services</li> </ul>	
Determine parking and obtain directional maps for visitors to include with invitation	<ul style="list-style-type: none"> <li>Utilize campus map</li> </ul>	
Confirm accessibility resources	<ul style="list-style-type: none"> <li>Ensure you have an operational plan in place for assisting those with disabilities</li> </ul>	
Schedule A/V run-through prior to the event	<ul style="list-style-type: none"> <li>Schedule speakers/musicians and others to participate (if live streaming or captioning, include those individuals, as well as any social media testing, i.e. Facebook Live)</li> </ul>	
Determine if additional space is needed	<ul style="list-style-type: none"> <li>Consider a private reception space/room for VIPS or pre-meetings if needed</li> </ul>	

### Event Promotion and Invitations – 6 Weeks Prior

Task	Comments	Completed
Assemble/address invitations		
Create RSVP tracking system	<ul style="list-style-type: none"> <li>Utilize EventBrite or MarqIt</li> </ul>	
Mail invitations	<ul style="list-style-type: none"> <li>Set RSVP deadline for 5-7 days prior to event</li> <li>Update website with RSVP information</li> <li>If using MarqIt or EventBrite, include link</li> </ul>	
Distribute flyers/emails advertising event		
Determine if signage needs to be produced – if out-of-house, order signage and large promotional materials	<ul style="list-style-type: none"> <li>Local companies include FastSigns</li> </ul>	

Schedule meetings or communicate with major stakeholders to ensure all needs are met		
If working with musicians/entertainers, schedule a sound check		
Create/purchase all needed decorations, other than flower arrangements		

### Assembling Materials – 4 Weeks Prior

Task	Comments	Completed
Confirm staff/volunteers for each aspect of the event		
Make parking and directional signs that can be created in-house		
Create welcome packets/materials for attendees		
Create script for yourself or for VIPs/presenters	<ul style="list-style-type: none"> <li>• Include phonetic spellings for any individuals' names that might be difficult to pronounce</li> </ul>	
Confirm all travel arrangements		
Coordinate vendor payments through MARQetplace		
Schedule meeting for any event staff/volunteers		

### Event Preparation – 1-2 Week(s) Prior

Task	Comments	Completed
Follow-up with RSVP list – make personalized phone calls & emails, if necessary		
Send final numbers to the caterer		
Confirm participation with all VIPs/presenters. Send them updated event details, run of shows, and talking points		
Create seating plans and room diagrams for assistance with set-up and day-of-event questions	<ul style="list-style-type: none"> <li>• Create place cards for seated meals, if needed</li> <li>• Ensure you have back-up seating options available for changes within table seating arrangements</li> </ul>	
Develop photo shot list		
Hold pre-event meeting with all significant stakeholders (vendors, managers of venue, key committee members and volunteers, etc.)		
Do one last walk-through of venue		
Hold training session with volunteers		
Ensure all printed materials/collateral are assembled and correct		
Make nametags/lanyards for attendees and prepare additional blank nametags for walk-in guests	<ul style="list-style-type: none"> <li>• Suggest magnetic/reusable with clip tags for those who are unable to use magnetic</li> <li>• If disposable, suggest Avery 8395</li> <li>• Preferred template – First name centered, last name underneath. Consider including student college or alumni class/year.</li> </ul>	

	<ul style="list-style-type: none"> <li>Consider purchasing/borrowing machine for onsite nametags</li> </ul>	
Share any guests' dietary needs with catering		
Gather event day supplies	<ul style="list-style-type: none"> <li>Include pens, sharpies, tape, scissors, etc.</li> </ul>	
Send final information to participants, including directions, maps, last minute details, etc.		

### Final Details – 1-2 Days Prior

Task	Comments	Completed
Ensure all appropriate contacts' info is listed where you can easily retrieve it	<ul style="list-style-type: none"> <li>Recommend adding to your phone for easy text ability</li> </ul>	
Purchase floral arrangements if not provided by vendor		
Recheck all equipment/materials to ensure nothing is damaged, quantity is correct, etc.		
Set-up registration area, if possible, so you are prepared for the next day		
Decorate room, if possible		
Display parking/directional signs		
Deliver materials/equipment to venue site		
Send reminder email to registered guests		
Test live web broadcast		

### Day of Event

Task	Comments	Completed
Arrive early and do final walk-through		
Ensure all VIP materials are correctly labeled and in place	<ul style="list-style-type: none"> <li>Provide a program to VIPs so they know speaking order</li> <li>Have additional scripts printed so speakers can review prior to speaking role</li> </ul>	
Connect with volunteers and staff to ensure they have all necessary information		

### Up to a Week After Event

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