**Event Management Checklist
Disclaimer:** Tasks and timelines vary depending on the nature and complexity of your event.

 **15 Weeks Prior**

|  |  |  |
| --- | --- | --- |
| **Task** | **Comments** | **Completed** |
| Determine goals and purpose of event  | * Who is your target audience for the event?
* What are you learning objectives, if applicable?
* What do you hope to accomplish?
* How will you gauge effectiveness?
 |  |
| Get approval to host your event at Reed | * Work with Conference & Events planning to make sure you get necessary approvals for facility use
 |  |
| Select date and time  | * Ensure hosts, VIPs and/or speakers are available for specified dates
* Determine if VIP’s spouse will be invited and ensure they can attend
* Consult campus calendar/religious calendars when selecting
* Think of campus culture/workday schedule when selecting times
 |  |
| Set budget |  |  |
| Research potential funding sources | * Could you partner with any other departments/entities?
 |  |
| Select and reserve venue | Remember to review:* Do you have necessary approvals?
* Will you need a rain plan?
* A/V capabilities
* Parking availability/restrictions
* Maximum capacities
* Other events occurring near space – will they conflict?
* Accessibility – how will persons with disabilities enter the venue?
* Access times to space
* Load-in/delivery capabilities
* Included equipment with room rental
* Surrounding sound impediments
* Security issues
 |  |
| Schedule rain plan, if applicable | * Select venue
* Determine who will make the rain plan call
* Determine how and when you will communicate the rain location
* As soon as rain plan is established, consider additional needs to accommodate the plan (e.g., different staff, vendors, rental equipment, etc.)
 |  |
| Develop communications plan  | * What is your event's main message?
* Determine what and when communications will be sent
* Work with Conference & Events Planning and Public Affairs to create print, web, social media, collateral, signage, and online elements
 |  |
| Schedule meetings planning team | * Go ahead and book time to meet regularly with key players
* Meet with and clarify goals with VIP's/guest's representatives
 |  |
| Determine guest list | * Confirm any special needs
 |  |
| Investigate needs for special permits, licenses, insurance, etc. |  |  |

**12 Weeks Prior**

|  |  |  |
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| **Task** | **Comments** | **Completed** |
| Update any website material |  |  |
| Add event to campus calendar and discuss other internal promotion opportunities | * Consult with Conference & Events Planning for complete list of calendars
 |  |
| Plan for parking & transportation needs |  |  |
| Schedule photographer |  |  |
| Schedule videographer |  |  |
| Set marketing/PR schedule |  |  |
| Plan speaker travel arrangements and hotel options |  |  |

**10 Weeks Prior**

|  |  |  |
| --- | --- | --- |
| **Task** | **Comments** | **Completed** |
| Secure A/V needs for event  | * Lighting
* Supplemental video needs
* Sound
* Coordinate additional mics in the audience for any Q&A needs
* Ensure you have on-site A/V tech for event
* Ensure you provide video specs to any presenter
 |  |
| Book catering needs with Bon Appetite | * Do any of your guests have dietary needs?
* Remember vegetarian options
* Determine VIP’s preferences
* Will you need linens?
* Remember waters for the podium and/or bottled for guests, if applicable
* Discuss service expectations - how many servers per table, when do you expect tables to be cleared, etc.
* Consider tailoring menu to VIP's/guest's interests/background
 |  |
| Secure entertainment/musicians | * Think about all aspects of the event (guest arrival, duration of event, etc.)
 |  |
| Begin designing printed pieces (e.g., invitations, tickets, flyers, programs, pamphlets, out-of-town guest booklets, etc.) |  |  |
| Develop press release and calendar listings |  |  |
| Request and receive speakers’/VIPs’ bios | * Ask for photo if included in program – high res jpeg
 |  |
| Send Save-the-Dates |  |  |
| Order plants/flowers |  |  |
| Schedule supplemental staffing | * Ushers, crowd management, etc.
 |  |
| Order décor materials | * Carpeting
* Pipe and Drape
 |  |
| Reserve additional set-up materials | * Rental chairs
* Stage
* Podiums
* Tables
* Easels
* Coat racks
* Heat lamps
 |  |

**8 Weeks Prior**

|  |  |  |
| --- | --- | --- |
| **Task** | Comments | **Completed** |
| Set menu with caterer – know that you can confirm the final head count approx. a week prior to the event |  |  |
| Secure permits and insurance |  |  |
| Determine if awards/trophies will be given and research companies |  |  |
| Release press announcements to national and local print media | * Work with public affairs
 |  |
| Order any giveaways |  |  |
| Arrange for transportation (buses, shuttles) if necessary |  |  |
| Determine parking and obtain directional maps for visitors to include with invitation |  |  |
| Confirm accessibility resources |   |  |
| Order speakers’ gifts |  |  |
| Begin editing printed programs/materials |  |  |
| Schedule A/V run-through  |  |  |

**6 Weeks Prior**

|  |  |  |
| --- | --- | --- |
| **Task** | **Comments** | **Completed** |
| Assemble/address invitations  |  |  |
| Create RSVP tracking system |  |  |
| Mail invitations | * Set RSVP 1.5-2 weeks (at minimum 1 week) prior to event date
* Update website with RSVP information
 |  |
| Order awards |  |  |
| Distribute flyers/emails advertising event |  |  |
| Finalize transportation logistics for VIPs and out-of-town guests |  |  |
| Release press announcements to local TV, radio media |  |  |
| Determine if signage needs to be produced  |  |  |
| Hold walk-through with major stakeholders/committee members to ensure all needs are met |  |  |
| Secure musicians/entertainers sound check  |  |  |
| Secure all needed decorations  |  |  |

**4 Weeks Prior**

|  |  |  |
| --- | --- | --- |
| **Task** | **Comments** | **Completed** |
| Confirm staff/volunteers for each aspect of the event |  |  |
| Create welcome packets/materials for attendees |  |  |
| Create script for yourself or for VIPs/presenters |  |  |
| Confirm all travel arrangements |  |  |
| Confirm security needs  |  |  |
| Coordinate with accounts payable and vendors on when payment will be received  |  |  |
| Schedule volunteer training |  |  |

**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 | * Create place cards for seated, if needed
* Ensure you have back-up seating options
 |  |
| 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 follow-up calls to media  |  |  |
| Make nametags/lanyards of attendees and extra plain ones for surprise guests |   |  |
| Create “Event Day Survival Kit” full of needed items: pens, sharpies, tape, scissors, etc. |  |  |
| Create detailed hour-by-hour event agenda (event plan) for key volunteers/vendors and distribute to them |  |  |
| Confirm set-up/breakdown with all vendors |  |  |
| Send final information to participants, including directions, maps, last minute details, etc.  |  |  |
| Create volunteer duty form |  |  |
| Wrap gifts |  |  |
| Send completed Run of Show and RSVP list within 72 hrs of event to VIPs |  |  |

**1-2 Days Prior**

|  |  |  |
| --- | --- | --- |
| **Task** | **Comments** | **Completed** |
| Create final to-do list to determine all tasks are complete |  |  |
| Ensure all appropriate contacts’ info is listed where you can easily retrieve it  | * Recommend adding to your phone for easy text ability
 |  |
| Purchase floral arrangements if not provided by vendor |  |  |
| Recheck all equipment/materials to ensure nothing is damaged, quantity is correct, etc.  |  |  |
| Reconfirm schedule with Bon Appetite |  |  |
| Set-up registration area, if possible, so you are prepared for the next day |  |  |
| Decorate room if you can |  |  |
| Display parking/directional signs |  |  |
| Lay out clothes and needed materials (name badge, notebook, etc.) |  |  |
| Deliver materials/equipment to venue site |  |  |
| Be prepared to troubleshoot changes day-of |  |  |
| Discuss rain plan logistics |  |  |

**Day of Event**

|  |  |  |
| --- | --- | --- |
| **Task** | **Comments** | **Completed** |
| Arrive early and do one last walk-through |  |  |
| Oversee vendor set-up |  |  |
| Ensure all VIP materials are correctly labeled and in place |  |  |
| Check all set-ups |  |  |
| Ensure waters are in podium |  |  |

**Up to a Week After Event**

|  |  |  |
| --- | --- | --- |
| **Task** | **Comments** | **Completed** |
| Send thank you notes |  |  |
| Handle invoices |  |  |
| Hold post-event meeting with key players to evaluate event |  |  |
| Send pictures/mementos to VIP guests |  |  |
| Pack up and inventory all materials |  |  |
| Update website  |  |  |
| Book next year’s venue, for annual event |  |  |
| Complete survey of event or any product/service provided |  |  |