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

**15 Weeks Prior**

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| **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**

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| **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**

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| **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**

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| **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**

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| **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**

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| **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**

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| **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**

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| **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**

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| **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 |  |  |