

INSTITUTIONAL ADVANCEMENT OFFICE EVENT PLANNING CHECK LIST

Logistics

- Name the Event (identify PURPOSE and AUDIENCE)*
- Create a folder (paper and electronic) for event
- Choose the date & plan backwards from it*
- Schedule event announcements (“Save This Date,” invitations, reminders)*
- What other events are going on at the same time?*
- Check availability of key people
- Look at budget (consider purpose, audience, and bottom line)
- Create a budget & submit to VPIA
- Select sponsors (carefully)*
- Create a contingency plan*
- Notify & involve Public Relations/Public Information staff
- Notify Sodexo or other food providers
- Promotion (how and where?)*
 - Call center
 - Brochures, posters, other posted advertising
 - Mailing – list & labels
 - Email
 - Website
 - Invite radio/CATS/newspapers
- Get deadlines for necessary announcements (e.g. C of C calendar)
- Event schedule (speakers, presentations, breaks, ceremonies, refreshments, entertainment)*
- Ask for help!

Resources

- Choose location (well in advance)*
 - Will residence halls be needed?
 - On campus? (If alcohol is served, need invite list)
 - Off campus
 - Choose back-up location
- ADA accessible (elevator, bathroom, seating)
- Order/purchase supplies
- Furniture & equipment – create a checklist*
 - Seating & tables
 - Flowers & decorations
 - Speaker’s area – microphone, sound system, podium
 - Laptop computer, projector, easels, etc.
- Music/Entertainment*
 - Space
 - Set-up
- Presentation setup*
 - Equipment
 - Technical support

- Presenter's prep area
 - Equipment
 - Technical support
 - Refreshments
- Presenters*
 - Content
 - Order of delivery
- Food planning*
 - Appropriate menu
 - Estimated amount
 - Dietary restrictions (vegetarians, allergies, other)
- Custodial services
- Volunteers: ID people best suited to assist with and "market" the event*
 - Lead volunteers – assign specific tasks & provide tools to do them
 - Are students assisting?
- Alumni/donor information gathering tools
 - Sign-up sheet(s)
 - Surveys
 - Sideline stories – pass on to "A Team"
 - Fundraising opportunities – pass on to IAC
 - Potential new partners – pass on to IAC
 - Alumni contacts – pass on to MCH
- Name tags/table tents
- Handouts*
- Schmooze with EVERYONE!

Wrap-Up

- Thank you to all involved*
- Credit to all involved*
- Compile feedback and LEARN from it
- Follow-up report – share with all stakeholders
- Update website*
- Inventory of supplies used (for next time)
- Follow-up celebration & "lessons learned" meeting
- Set date for next event* and start over!

** Must be vetted by or reported to VPIA and IAC*