

Timeline and Checklist for Event Planning

| | |
|-----------------------|--|
| Event Name: | |
| Date: | |
| Location(s): | |
| Planner/Prime: | |
| Description: | |
| Purpose: | |
| Time: | |
| # of Guests: | |
| VIPs: | |

Three to four months before the event

| Activity | Person Responsible | Due Date |
|---|--------------------|----------|
| Establish planning group and appoint chair | | |
| Hold planning meeting re event goals and details | | |
| Establish responsibilities | | |
| Determine funding and budget sources | | |
| Reserve date on key attendees' calendars – follow protocol for requesting Chancellor or Provost participation | | |
| Determine and reserve venue | | |
| Confirm speaker and speaker needs | | |
| Block hotel rooms for out of town speaker, VIP guests | | |
| Determine guest list, request alumni data | | |

Two to three months before the event

| | | |
|---|--|--|
| Create and order save-the-date cards, invitations, response cards and related materials (i.e. map, etc), OR meet with Director of Communication or vendors to discuss print materials needed for event. | | |
| Meet with Director of Communication to discuss publicity | | |
| Draft program agenda | | |
| Determine signage requirements (pedestrian & vehicle) | | |
| Determine on-site registration procedures, including ushers | | |
| Book event with caterer and establish preliminary menu | | |
| Contact Transportation for parking assistance | | |
| Contact Campus Police for safety and security assistance | | |
| Contact Fleet Services for bus and car transportation | | |
| Contact vendors as required for: tent, stage, podium, chairs, tables, AV equipment (sound, lighting, projector, computers, etc), flowers, plants, other decorations | | |
| Mail save-the-date cards | | |

Six weeks before the event

| Activity | Person Responsible | Due Date |
|--|--------------------|----------|
| If alcohol is being served, request necessary approvals and NC permits – if “Cocktails” are noted on invitation, complete this step prior to ordering invitations. | | |
| Arrange for photographer | | |
| Send print invitations | | |

Four weeks before the event

| | | |
|--|--|--|
| Approve final program/agenda | | |
| Draft script or talking points for speakers | | |
| Work with Director of Communication on copy for internal and external publicity | | |
| Meet with vendors on site, follow up on all orders | | |
| Consider site preparation (special cleaning, equipment and trash removal) (Contact Facilities Operations for assistance) | | |
| Prepare event signage | | |
| Send electronic invitations | | |

Two weeks before the event

| | | |
|---|--|--|
| Review staffing assignments for day of event | | |
| Meet on site with operational staff such as transportation officials and ushers to discuss responsibilities | | |
| Meet with caterer on site to discuss setup and final menu | | |
| Send out attendance update to planning team/key players | | |

One week before the event

| | | |
|--|--|--|
| Send caterer final count | | |
| Print programs, name badges, seating charts, place cards, etc. | | |
| Confirm arrangements with vendors | | |

24 Hours before the event

| | | |
|---|--|--|
| Contact caterer to verify all arrangements | | |
| Confirm security requirements | | |
| Ensure tent, chairs, tables, stage, podium are in place | | |

Day of the event

| Activity | Person Responsible | Due Date |
|--|--------------------|----------|
| Check location setup to include chairs, tables, podium, food | | |
| Arrange printed material, nametags, etc. on registration table | | |
| Check sound and lighting equipment with vendor(s) | | |
| Ensure space and hook-ups are available for media | | |
| Ensure decorations are in place | | |
| Place water at podium | | |

One to five days after the event

| | | |
|---|--|--|
| Write thank you notes to speakers, volunteers, staff and others as appropriate | | |
| Complete written evaluation of the event with suggestions for future events | | |
| Coordinate event story and photographs with Communications | | |
| Send address updates to Development Office for submission to university database | | |
| Send final attendance list to Development Office so that contact reports/notes can be entered into database | | |