

Pre-Event Planning Guide

This form provides you with a series of items to consider when planning an event. Please keep in mind that all activities should be consistent with the University's missions, policies, and procedures.

Organizer Information

- Name of Organization (Office/Department):
- Name of Person Completing the Form:
- E-mail:
- Phone:

Event Information

- Name of Event:
- Type of Event:
- Date/Time Options:
- Event Location:
- Backup Location:
- Estimated Number of Attendance:

Planning

- What are the goals of this event? Are they achievable?

- What are the things need to be improved, compared to the previous event?

- Is the budget secured and adequate?

- Do you need any volunteers? How many and what responsibilities would they have?

Checklist

Check

At Least 3 Months Before (Insert Date)	Organization	Brainstorm and decide what kind of event you are organizing. Choose a theme if appropriate.	
		Draft flowchart for planning and arrangement.	
	Scheduling	Set a date and see if your preferred venues are available.	
		Submit the online Employee Intake (date, venue, requests).	
	Budget	Draft budget, identify source and sponsor (if any).	
	Staffing	Organize an event planning committee if needed. Set regular meetings with the committee if necessary.	
		Decide if you need any volunteers and recruit them now.	
	Invitation	Decide how you will manage RSVPs.	
		Generate and update mailing list.	
		Choose and invite speakers if any.	
		Arrange flights, transportation, and lodging for guests if necessary.	
		Draft and send invitations and make sure they are publicized on the events calendar.	
	Audio/Visual	Book any equipment, supplies, and request for any technical support (i.e. microphones, lighting, etc.).	
	Supplier	Decide on what suppliers you need (i.e. catering, performance, décor, printing, souvenirs, etc.).	
	Catering	Decide on any food, drink, and snacks that are required. Order them, if necessary.	
		Check if you need extra plates, napkins, and forks (disposable/non-disposable).	
		Decide if you need to rent tables, chairs, table cloths, and chair covers.	
Production	Prepare promotional materials (i.e. flyers, posters, banners, etc.).		

Check

At Least 1 Month Before (Insert Date)	Organization	Check the floor plan of the venue and surrounding facilities.	
	Invitation	Keep track of RSVPs, guest lists, sponsors (if any), etc.	
		Check dietary requirements from guests and participants.	
		Follow up with logistical arrangements for guests if any.	
	Program	Finalize program and running sheet.	
		Brief speakers on final program and running sheet.	
		Share program with caterers and other suppliers - when to serve food, step in.	
	Staffing	Start weekly (or biweekly) meeting with planning committee and follow up with preparation progress regularly.	
		Decide who will meet and greet guests and VIPs.	
		Draft and share volunteers' day-of duties.	
	PR	Submit event information to University PR Team, student newspaper, local community and media.	
		Contact local media (if necessary) to attend the event.	
	Hospitality	Book courier and transportation if necessary.	
		Decide and draft design of gifts for guests and VIPs.	
Ambience	Arrange floral decorations (if necessary).		
	Prepare background music.		
Security	Secure first aid kit and AED (Automated External Defibrillator).		

Check

At Least 2 Weeks Before (Insert Date)	Organization	Confirm layouts for tables, chairs, and VIP seating.	
	Invitation	Keep track of RSVPs, guest lists, sponsors (if any), etc.	
		Confirm and share logistical arrangements for guests.	
	Supplier	Confirm event information with all suppliers and arrange delivery date, time, payment, etc.	
	Production	Double check wordings, size, logos, proceeding orders of each production.	
	Hospitality	Create welcome signs at the entrances to the venue.	
		Confirm courier/transportation reservations.	
Confirm gifts for guests and VIPs.			

Check

At Least 1 Week Before (Insert Date)	Invitation	Complete a final list of participants and create a sign in sheet for registration.	
	Staffing	Create and share day-of duties for volunteers.	
		Meet with committee and volunteers to go through their roles and duties.	
	Audio/Visual	Make sure all supplies and equipment are ready to be set up.	
Guest Comfort	Check wheelchair access and toilet facilities.		

Check

Day Before the Event (Insert Date)	Organization	Clear location directions.	
		Go through the overall flow of event and rehearsal (if necessary).	
	PR	Send press release to media and local community.	
	Audio/Visual	Test audio visual equipment and go through a rehearsal.	
	Production	Check typos and make sure all handouts are printed in good status.	
Hospitality	Make sure all souvenirs are nicely wrapped or packed.		

Check

Day of Event (Insert Date)	Staffing	Meet with committee and volunteer at least 3 hours before event set up to make sure everyone knows their roles and duties.	
	Audio/Visual	Set up and test audio visual arrangements at least 2 hours before the event.	
	Hospitality	Post direction signage at least 3 hours before the event.	
	Ambience	Set up décor at least 3 hours before the event.	

Check

After the Event (Insert Date)	Organization	Remove all postings including flyers and directions.	
	Invitation	Send thank you letters to all participants, sponsors, committee members, and volunteers.	
	Budget	Track payment status with suppliers and submit expense reports to Finance Team.	
	PR	Organize all event photos by dates and sessions.	
		Send photos to PR, media, and local community where you sent press release.	
Evaluation	Complete the Post-Event Evaluation Form.		