

IN-PERSON EVENT PLANNING CHECKLIST

NAME OF EVENT: _____

EVENT PLANNER CONTACT

NAME: _____

MOBILE: _____ EMAIL: _____

EVENT DATE(S):

DATE(S): _____ DAY(S): _____

TIME(S): _____

PRE-PLANNING MEETING

- Establish your event goals and objectives:
 - Do you want to raise money or awareness? How many attendees are you hoping to get? Establishing it upfront will make it easier to gauge the success of your event.
- Select the date and book event location:
 - Make sure it doesn't conflict with any other campus events or major holidays
 - Assess accessibility requirements (i.e. wheelchair accessibility, lactation room, etc.)
- Develop an event master plan:
 - Ironing out every detail will help ensure you don't miss a thing
- Create an event budget:
 - Some costs you might need to consider are:
 - Venue (if off campus, negotiate details)
 - Food and beverages
 - Décor
 - Equipment
 - Speaker fees
 - Graphics
 - Insurance and special permits (Liability insurance is required for any third party clients, vendors, contractors, alcohol, etc. If you are unsure, please contact the University and External Events office.)
 - Security
 - A/V
 - Parking, valet, shuttle service
- Brand your event:
 - Start building out an event website that describes the event
 - Develop event graphics and tagline
 - Utilize the MSMU style guides and toolkit to help you stay on brand
- Recruit an event committee (typically only applicable for large-scale events)
- Create a list of prospective sponsors and community partners

14 WEEKS OUT | DATE: _____

- Create a “punch list” to outline every task and deadline (marketing, tech, speaker details, social media, graphics, etc.)
- Initiate a conversation with Security and Parking to create a plan
 - Include full event details including an expected headcount
- Identify and confirm speakers/presenters/entertainers
- Start discussing catering and décor
- Create event invitation/mailling/email list and VIP list

12 WEEKS OUT | DATE: _____

- Determine printed and/or digital materials:
 - Save the Date and Invitation mailers or evites
 - Programs/menus
 - Posters promotional flyers/banners/directional signage
 - Nametags/table tents
- Print/mail/email save the date
- Create your promotional plan (i.e. newsletter articles, ads, social media, media releases, etc.)
- Begin contacting entertainment/performers/speakers
- Financial/Administration:
 - Determine registration fees
 - Set up and enable online registration
 - Finalize sponsor levels and benefits
 - Identify items to be underwritten
 - Create an income and expense report

10 WEEKS OUT | DATE: _____

- Book media services (audio/visual/group WiFi)
- Alert Facilities about the following:
 - Schedule housekeeping
 - Confirm no major projects/renovations are happening the day of your event
 - Turn off sprinklers if event is on the lawn
- Book photographer/videographer
- Create online engagement opportunities such as using hashtags on social media, live polls and Q&A, photo contest, ice breakers, etc.

8 WEEKS OUT | DATE: _____

- Update event collateral:
 - Event website to include schedule, speakers, special guests, etc.
- Place orders or requests:
 - Catering/décor/awards
- Request logos from corporate sponsors and partners for online and printed materials

6 WEEKS OUT | DATE: _____

- Call for volunteers
- Print/mail/email invitation
- Printed materials go into production (posters/promotional flyers/banners/signage)
- Create online social media action kit to spread the word about the event:
 - Includes: graphics, sample text, and your social media handles
- Speaker/presenter/entertainer liaison:
 - Work on presentation/speech topics
 - Request bio and photo
 - Travel and accommodation arrangements
 - Finalize contract

4 WEEKS OUT | DATE: _____

- Draft scripts and run of show (run of show is the program flow/timeline)
- Assign staff and volunteer duties
- Share social media action kit with all event participants (staff, speakers, sponsors, partners and attendees)
- Schedule prep meetings with speakers to discuss talking points
- Arrange transportation/car service for speakers

2 WEEKS OUT | DATE: _____

- Create and finalize a seating chart and/or venue layout
- Create all event slides and graphics
- Meet with leadership and speakers:
 - Review and finalize scripts, run of show, guest list and seating chart
- Send printed programs to print:
 - Along with any “event day” items (i.e. table numbers, name cards, menus, etc.)
- Create a shot list for photographer/videographer
- Create speaker prep kits to include all important event details
- Sponsorship and partner finalization:
 - Follow up to confirm sponsorships and underwriting
 - Confirm sponsors/partners have all necessary event details, reserved parking, etc.
 - Gather any promotional materials you'll be sharing at the event
 - Ask sponsors/partners to share event on their promotional channels

1 WEEK OUT | DATE: _____

- Final meeting with event committee:
 - Ensure everything is on track
 - Review registration list and identify important attendees
- Review roles and responsibilities with event staff and volunteers
- Send each speaker their unique speaker's prep kit
- Finish any in-house printing
- Assemble registration table materials
- Send event confirmation/reminder email to attendees
- Send final attendee RSVPs to the following:
 - Catering: Include number of meat, vegetarian, special dietary restriction options
 - Parking/Security
 - Key leadership, fundraisers, staff
- Complete seating chart:
 - Send to caterer if necessary
- Check weather forecast:
 - If event is outdoors, monitor all week leading up to the event

DAY BEFORE EVENT | DATE: _____

- Print final scripts and run of show
- Create and print contact list to include cell phone numbers of all staff, volunteers and vendors working event
- Collect event day materials
- Confirm media attendance
- Speaker/entertainer rehearsals
- Early delivery and setup (if possible)

DAY OF EVENT | DATE: _____

- Oversee venue setup:
 - A/V and stage (tech check is a must)
 - Tables/Chairs
 - Floral
 - Signage
- Place programs/menus/gifts at tables and scripts on podium
 - Verify there are no last minute changes to script
- Set-up registration/check-in:
 - Include necessary items (ie. blank name badges, paper, pens, tape, stapler, etc.)
 - Ensure there are enough outlets and WiFi is working
- Set-up VIP and/or speaker green room
- Brief volunteers on duties and alert them of any changes
- Venue walkthrough to make sure everything is prepared for the event
- Speaker/entertainment rehearsals (if they could not rehearse the day before)

POST EVENT

- Event survey
- Send thank you emails to event participants including speakers, attendees, volunteers, sponsors and partners
- Edit event video/photos and post online
- Share highlights on social media
- Event debrief with key people:
 - After the event, it is always a good idea to assess and evaluate all aspects of the event
- Finalize income and expense budget
- Collect the following information to reference for future planning:
 - Final registration data/event metrics
 - Script or production notes
 - Meeting notes and important emails
 - Event set-up and layouts
 - Completed checklist
 - Security plan
 - Day-of notes and materials
 - After-action notes

NOTE: These suggestions are meant to help guide your event planning process. Not all items will be relevant to your event. MSMU support services are available to assist in making your event a success. While some services and special rentals may be outsourced to third parties, the Mount does have full event service capability.

University and External Events

Need help? Contact Heather Schraeder at hschraeder@msmu.edu or Susan Lee at slee@msmu.edu