Mount
Saint Mary's
University
LOS ANGELES

UNIVERSITY AND
EXTERNAL EVENTS

VIRTUAL 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:
  – Make sure it doesn't conflict with any other campus events or any major holidays
☐ 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:
    o Equipment
    o Speaker fees
    o A/V
    o Graphics
☐ Brand your event:
  – Start building out an event website that describe 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 for large-scale events)
☐ Create a list of prospective sponsors and community partners
☐ Research and select virtual event platform:
  – Zoom Pro and other third-party event platforms are available to host your event, promote event details and manage the registration process
  – Determine whether you want to use Zoom webinar or meetings. Also, determine the Zoom settings to best fit your needs.

14 WEEKS OUT | DATE: _____

- ☐ Create a "punch list" to outline every task and deadline (marketing, tech, speaker details, social media, graphics, etc.)
- ☐ Identify and confirm speakers/presenters/entertainers
- ☐ Create event invitation/mailing list and VIP list

12 WEEKS OUT | DATE:

- ☐ Determine printed and/or digital materials:
  - – Save the Dates and Invitations
  - – Programs
- ☐ 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 and income and expense report

10 WEEKS OUT | DATE: _____

- ☐ Book media services (audio/visual/group WiFi)
  - – Determine whether you need additional computers, speakers, etc. set up for your event if you're filming a portion of it on campus
- ☐ 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:
  - – Décor/awards
- ☐ Request logos from corporate sponsors and partners for online and printed materials

6 WEEKS OUT | DATE: _____

- ☐ Call for volunteers
  - – Support with tech, lead networking breakout rooms, respond to Zoom chat or Q&A questions, speaker host and/or emcee
- ☐ Print/mail/email invitation
- ☐ 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
  - – 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

☐ Assess event participants (speakers, volunteers, virtual event hosts) technical needs/support
  – You may need to send speakers higher tech cameras, microphones, Ring light (for better lighting), banners and other a/v to ensure a quality production
  – Be sure their background is professional and has sufficient lighting
  – You may need to purchase some of these items if you're hosting virtual events regularly

2 WEEKS OUT | DATE:_____

☐ Create all event slides and graphics
  – Meet with leadership and speakers:
  – Review and finalize scripts, run of show and guest list

☐ Determine if you plan to stream your event on Facebook and/or YouTube. Set up in advance.

☐ Create a shot list for photographer/videographer (if applicable)

☐ Create speaker prep kits to include all important event details and virtual event best practices

☐ Sponsorship and partner finalization:
  – Follow up to confirm sponsorships and underwriting
  – Confirm sponsors/partners have all necessary event details, reserved parking, etc.
  – Ask sponsors/partners to share event on their social media 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

☐ Send event confirmation/reminder email to attendees

☐ Send final attendee RSVPs to the following:
  – Key leadership, fundraisers, staff

DAY BEFORE EVENT | DATE:_____

☐ Make sure all tech is set up and working properly.

☐ Distribute final scripts and run of show

☐ Create and distribute contact list to include cell phone numbers of all staff, volunteers and vendors working event

☐ Confirm media interest

☐ Speaker/entertainer rehearsals

☐ Early delivery and setup (if applicable)

☐ Oversee setup
  – Pre-event rehearsal and tech check with all speakers (at least one hour ahead)
  – Complete and double check all virtual event settings on Zoom such as: mute all participants upon entry, open or close attendee chat, allow panelists to start / stop video, etc.

☐ Brief volunteers on duties and alert them of any changes

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