

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		