



## **EVENT PLANNING REQUIREMENTS**

*In an effort to streamline procedures for event scheduling at Urbana University, the following steps have been identified to assist planners in implementing successful events and activities, Your compliance with these measures will also ensure that those who need to know about your event are informed in a timely manner. Please also be advised that all event expenses should be charged to your approved department or group budget, and that you will need to have a corresponding budget account number to arrange for various event-related charges.*

✓ **STEP ONE: EVENT/MEETING LOCATION (ASAP)**

Contact **Debbie Eubanks** to reserve the event/meeting space at 484-1273. ([deubanks@urbana.edu](mailto:deubanks@urbana.edu)).

✓ **STEP TWO: CAMPUS CALENDAR (ASAP)**

Complete the **Event Calendar Request Form** (attached) and forward to **Christina Bruun-Horrigan** at 484-1354 ([cbruunhorrigan@urbana.edu](mailto:cbruunhorrigan@urbana.edu)). If your event is intended as a fund raiser, please note on this form. Please also copy your email form to [jgore@urbana.edu](mailto:jgore@urbana.edu) and [lgleson@urbana.edu](mailto:lgleson@urbana.edu).

✓ **STEP THREE: MAINTENANCE (minimum 4 weeks in advance of event)**

Contact **Kim Gibson** at 484-1203 ([kgibson@urbana.edu](mailto:kgibson@urbana.edu)) regarding event meeting space set-up and other maintenance needs.

✓ **STEP FOUR: FOOD SERVICE (minimum 4 weeks in advance of event)**

By contract, all events held on campus are to be catered by Sodexo Food Service. Contact **Bill Robbins** or **Amy Johnson** at 484-1250 ([brobbins@urbana.edu](mailto:brobbins@urbana.edu)) to make arrangements for catering needs.

✓ **STEP FIVE: EVENT MARKETING & PUBLICATIONS (minimum 6-8 weeks in advance of event)**

If your event involves printing invitations, posters, flyers, tee-shirts, or other marketing needs, complete a **Marketing Request Form** (attached) and forward to **Melissa Closser** at 484-1370 ([mclosser@urbana.edu](mailto:mclosser@urbana.edu)).

A sample **Event Planning Checklist** is also attached, containing useful information on structuring a successful event. If you have questions or need more clarification, contact Jim Thornton at 484-1297 ([jthornton@urbana.edu](mailto:jthornton@urbana.edu)).



## **SAMPLE EVENT PLANNING CHECKLIST**

### **Six to Twelve Months Prior to Event**

Yes	No	N/A		<b>Date Completed</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Check for possible date conflicts (Champaign and other counties)	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Date secured	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Site secured (If outside event, choose alternate in event of rain)/ Room(s) reservation made	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Facilities Work Request (form on website)	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Chose theme	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Initial budget drafted	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Decide if admission cost is necessary and amount	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Speaker, entertainment secured (by contract)	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	VIP's invited/honored (Get bios)	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Menu set with Sodexo Food Services Manager	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Look for decorations	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Create sponsorship amount and list	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Design invitations, posters, brochures, etc./ Final approval by Director of Marketing	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Get bids for printing/Director of Marketing	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Compile necessary mailing list	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Decide media for advertising (newspapers, radio, tv) Work with Director of Marketing	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Set marketing/public relations schedule	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Investigate need for special permits, license, etc.	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Create subcommittee	_____

### Three to Six Months Prior to Event

Yes	No	N/A		Date Completed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Begin meetings with subcommittee (set meeting dates)	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Contact sponsors on list for funding	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Request logos from corporate sponsors for printing	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Finalize copy for invitations, return card, brochures, posters	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Finalize copy for tickets	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Complete mailing list for invitations	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Order invitations, brochures, posters	_____
<hr/>				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Make list of locations for posters, brochures	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Set menu	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Select awards, trophies, plaques	_____

### One to Three Months Prior to Event

Yes	No	N/A		Date Completed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Give invitations to Executives for personal notes	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mail invitations	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Distribute posters	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Finalize any necessary accommodations for speakers	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Finalize decorations	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Review needs for registration	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Confirm staff/hostesses for registration	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Check on ticket sales	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Give estimate of expected guests to caterer	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Make table diagram to assign seats	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Schedule delivery of special equipment	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Confirm set up and tear down times	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Finalize decorations	_____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Meet with subcommittee to finalize checklist	_____

### Immediate week to One Month Prior to Event

Yes No N/A

- |                          |                          |                          |   |       |
|--------------------------|--------------------------|--------------------------|---|-------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Confirm number attending                              | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Finish seating/table arrangements                     | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Finalize training with volunteers & committee         | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Distribute seating chart to hostesses                 | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Schedule pickup or delivery of rented equipment       | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Establish amount of petty cash needed for emergencies | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Have checks ready for payment on the day of event     | _____ |

### Event Day

Yes No N/A

- |                          |                          |                          |  |       |
|--------------------------|--------------------------|--------------------------|--|-------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Be sure all VIPs are in place                            | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Go over final details with caterer and setup staff       | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Check with volunteers to make sure all tasks are covered | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Set up registration area                                 | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Confirm refreshments/meal schedule for volunteers        | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Confirm tear down  | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Check site at conclusion of tear down                    | _____ |

### Week after the Event

Yes No N/A

- |                          |                          |                          |  |       |
|--------------------------|--------------------------|--------------------------|--|-------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Send thank you notes   | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Reconcile all invoices and pay any unpaid invoices           | _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Meet with any subcommittees and volunteers to evaluate event | _____ |



## **EVENT CALENDAR REQUEST FORM**

Requested by:

UU Extension #:

Department/Group Name:

Event Date & Time:

Location:

Event Title/Theme:

Speaker/Entertainment:

Purpose of Event:

Will there be an admission charge?

☐ Yes (Amount: \$\_\_\_\_\_)

☐ No

Is your event a fund-raiser?

☐ Yes

☐ No

Expected number of attendees:

Notes:

Please complete and return via email to [cbruunhorrigan@urbana.edu](mailto:cbruunhorrigan@urbana.edu), with email copies to [jgore@urbana.edu](mailto:jgore@urbana.edu) and [jgleeson@urbana.edu](mailto:jgleeson@urbana.edu). Thank you!



## Marketing Request Form

Please fill out a separate form for each marketing request you have, print/scan and email it to [mclosser@urbana.edu](mailto:mclosser@urbana.edu) (along with any photos/attachments, etc.) at least **four weeks prior to the event date**. Marketing requests will be put in due date order (i.e. the item with the closest due date will be worked on first) - so it is important to **include a due date**. A missing due date will put your request at the back of the pile.

Department \_\_\_\_\_

Contact Person \_\_\_\_\_

Contact Phone \_\_\_\_\_

Event/Project Name \_\_\_\_\_

Event/Project Details

e.g. Date, Time, Location, etc.

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Due Date

should be at least one week prior to  
when the piece is needed  
in-hand to allow for printing

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### Type of Requested Collateral

☐ Web

☐ Printed

☐ Postcard

☐ Form

☐ Flyer

☐ Brochure (indicate type of brochure in 'other' line)

☐ E-blast/Survey

☐ Handbook/Directory/Magazine (due to the size of this type of item, submit request 60-90 days prior to due date)

☐ Poster

☐ Photography (specify date/time of event where photography is needed - photography at events is **NOT** a guaranteed marketing item)

☐ Other

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What is your marketing goal?

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Who is your target audience?

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How will you follow up?

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**Dimensions** specify inches for printed materials and pixels for Web display materials \_\_\_\_\_

**Quantity** \_\_\_\_\_

**Copy** include complete text; attached separate text file if necessary

**Special Instructions**

## Approval Process

Once you have reviewed the marketing piece, please check and sign off. Once each person has signed off, the document will be sent to the printer or printed in-house.

☐ Contact Person \_\_\_\_\_

☐ Department Head/Committee Rep (if needed) \_\_\_\_\_

☐ Christina Bruun-Horrigan (text proofing) \_\_\_\_\_

☐ Melissa Closser (graphic/brand proofing) \_\_\_\_\_