

School of Social Work Event Planning Checklist

From one year to six months prior to the event

- Determine the purpose, format and target audience
- Create an estimated budget and get approval, if necessary
- Select the date; before confirming double-check for conflicts with other major functions
- Create an event team
- Draw up preliminary guest list categories.
- Select a name or theme
- Select and reserve a facility
- Develop a rain plan, if the event is to be held outdoors
- Reserve a block of hotel rooms, if necessary
- Choose a caterer
- Select and order recognition items (award, honor, citation)
- Order souvenirs, printed folders, and other give-away items
- Reserve rental equipment such as vans, buses, tables, chairs, tents, podiums, etc.
- Confirm program speakers
- Plan promotion and publicity of event to internal and external audiences

Three months prior to the event

- Write copy, design and get approval of printed invitations and all other printed materials
- Finalize guest list
- Send save-the-date cards to guests (3 to 5 months prior to the event)
- Contact program participants and
 - Supply suggestions for their remarks
 - Gather their biographical information
 - Request a photo of each participant for publicity and programs
- Keep campus officials, deans, and administrative officers informed
- Meet or contact UW Parking to discuss parking/shuttle if needed
- Decide on music, book entertainers and talent
- Plan the decorations and color scheme
- Contact and/or meet with the florist
- Update security on your plans.
- Contact SSW Tech and photographer or videographer if needed

Two months prior to the event

- Select menus and confirm contract with outside vendor
- Prepare mailing labels for invitation mailing
- Send out invitations 4 to 6 weeks prior to event (depending on event)
- Finalize decor and facility arrangements
- Make hotel and transportation arrangements for out-of-town speakers, VIPS or guests
- Mail an itinerary to speakers, VIPS or guests
- Prepare, write and print the program
- Finalize the audiovisual presentations
- Order any ceremonial items needed
- Inspect the facility – make sure there are no safety hazards and is accessible for disabled
- Recruit volunteers to staff registration if needed

Two to four weeks prior to the event

- Meet with Event coordinator to review logistics
- Record and acknowledge RSVPs as they are received
- Mail out confirmations tickets
- Confirm building requests: unlock rooms and floors for date and times.
- Send detailed instructions to all staff and participants (including tickets, parking permits, and maps)
- Finalize details with caterer and all vendors
- Write speeches and introductions, if necessary.

One week prior to the event

- Create a schedule outlining all deliveries, etc, and timing for the event
- Print out the guest list in alphabetical order
- Finish place cards, table cards, and/or name tags
- Create the seating chart, if needed
- Plan a meeting or contact all staff, greeters, ambassadors and volunteers on their duties
- Gather all presentation items such as gifts, plaques, trophies
- Prepare the briefing packet and send along with the guest list to VIPs and Deans (with full names, titles, business and professional affiliations, and other specific interests), biographies, and the final schedule of events to administrative leadership or host
- Deliver prepared introductions, citations and speeches to those who will read them
- Contact catering with RSVPs and guarantees
- Prepare event box with any supplies, such as tape, string, zip ties, staplers, clip boards, baskets, etc.

Day of the event

- Arrive early
- Bring the logistical outline, production schedule, directions, phone numbers, food orders, seating charts, name tags, table assignments, guest lists, and the event supply box with you
- Check all facilities
- Set up event venue with tables, signs, awards, etc. (Complete the day before for morning events)
- Conduct sound, computer checks.
- Set up registration. Be sure it is ready no later than 45 minutes prior to the start of your event.

After the event

- Send thank you notes to staff, volunteers and vendors
- Finalize billing and prepare final budget, if necessary.
- Conduct event meeting to discuss success or ways to improve in the future
- Survey attendees