



UBC EVENT PLANNING CHECKLIST

CONTACTS

- ☐ Event coordinator: _____
- ☐ Host: _____
- ☐ Originator/department: _____

BASIC PLANNING ELEMENTS

- ☐ Name of Event: _____
- ☐ Event Date and Time: _____
- ☐ Theme week? Name of week: _____
- ☐ Location/Venue: _____
- ☐ Budget Amount: _____ Drafted? _____
- ☐ Speed chart: _____
- ☐ Accounts (#, for what?): _____
- ☐ Budget contact: _____
- ☐ Other events this day? _____
- ☐ Purpose of event: _____
- ☐ Type of event:
 - ☐ Event
 - ☐ Meeting
 - ☐ Workshop
 - ☐ Conference
- ☐ Target audience: _____
- ☐ Number of guests anticipated: _____
- ☐ Invitee Authorization Form required? ☐ Yes ☐ No
Prepared? _____

PLANNING TEAM AND VOLUNTEERS

- ☐ Planning committee members: _____
- ☐ Required # of volunteers: _____
- ☐ Volunteer coordinator: _____
- ☐ Review checklists, assign responsibilities and timelines: _____

VENUE

- ☐ Venue selected (yes, no, name, date confirmed): _____
- ☐ Set up and tear down time required: _____
- ☐ Time venue booked for: _____
- ☐ Campus Security Form (required? submitted?) _____



- ☐ Tenting required (yes, no, provider): _____
- ☐ Rain/poor weather contingency plans made (yes, no, what): _____

CENTRAL BOOKING OFFICE

- ☐ Book space online (Submitted): _____
- ☐ Confirmation will be received within 24 hours of submitting your request.
- ☐ Revisions? ☐Yes ☐No Submitted: _____
- ☐ Invitee Authorization form? (Submitted? Date?) _____
- ☐ Additional charges?(additional labor, set-up and tear down time, room rentals, cleaning, a/v equipment etc.) _____
- ☐ Require additional equipment from IT Services? _____
- ☐ Facilities work order? (submitted, date?) _____
- ☐ IT/Media work order? (submitted, date?) _____
- ☐ Signage? (Facilities work order submitted?) _____
- ☐ Contact Classic Fare Catering for food and beverage needs
- ☐ Require parking? _____
- ☐ Contact Aramark for alcohol requirements
 - Catering Special Occasion License (SOL)
 - Obtain your SOL from Aramark.
 - Provide all information on the SOL and return to Aramark
 - Provide approved copy of SOL to Campus Security 5 days prior to event
Date submitted _____
 - Campus Security Event Application Form
 - To be filled out and given to the Security office 25 days prior to the event start date. (Date submitted) _____
 - Take signed copy to Kelowna RCMP 21 days prior to event
- ☐ Provide approved insurance to Campus Security 5 days prior to your event. Date submitted: _____

REGISTRATION, INVITATIONS, GUEST LIST

- ☐ Registration set-up? Early bird/Deadlines? _____
- ☐ Invitations/save the date needed? _____
- ☐ Print or email invitations? _____
- ☐ Guest List provided by? By when? _____
- ☐ Individual invite or with guest? _____
- ☐ Parking pass or map needed? _____
- ☐ RSVP's and contact: _____



MARKETING/COMMUNICATIONS

- ☐ Communications web form(yes, no, date submitted): _____
- ☐ Client marketing plan created? _____
- ☐ Invitation/save the date drafted/designed? _____
- ☐ Invitation/save the date sent? Date: _____
 - ☐ Delegates
 - ☐ Students
 - ☐ Staff
 - ☐ Faculty
- ☐ Material for website (yes, no, date submitted): _____
 - ☐ Info page
 - ☐ Registration form
 - ☐ Schedule/map
- ☐ Internal communications(yes, no, date submitted): _____
 - ☐ Exchange
 - ☐ TVs
 - ☐ Electronic sign
 - ☐ Events page
 - ☐ Campus online calendars
- ☐ External/off campus communications (yes, no, date submitted): _____
 - ☐ Press release
- ☐ Castanet events page posting (yes, no, date completed): _____
- ☐ Blog/hootsuite/FB (yes, no, date completed): _____
- ☐ Poster distribution (yes, no, date distributed): _____
- ☐ Event signage (yes, no, where, who): _____
- ☐ UBCO.tv invitation (yes, no, date sent): _____
- ☐ Photography required at event (yes, no, photographer): _____

MARKETING DELIVERABLES

- ☐ Poster (yes, no, date due): _____
- ☐ Web icon(yes, no, date due): _____
- ☐ Logo/emblem(yes, no, date due): _____
- ☐ .eps file (yes, no, date due): _____
- ☐ Invites (yes, no, date due): _____
- ☐ Program (yes, no, date due): _____

PRINTED PROGRAMS/HANDOUTS/GIVEAWAYS/AWARDS



- ☐ Printed program (yes, no): _____
- ☐ Printed program (content provided by? When?): _____
- ☐ Printed program (design, printing, delivery): _____
- ☐ Other handouts: _____
- ☐ Giveaways (yes, no, what): _____
- ☐ Giveaways (staff responsible, source, budget, delivery): _____
- ☐ Awards (yes, no, what): _____
- ☐ Awards (staff responsible, source, budget, delivery): _____

EVENT PROGRAM/SPEECHES

- ☐ Event script created? Shared? _____
- ☐ Is there a speaking program? _____
- ☐ Speakers/roles (Drafted? Confirmed?): _____
- ☐ Emcee: _____
- ☐ Keynote Speaker: _____
- ☐ Event Outline: Drafted? _____ Approved? _____ Circulated? _____
- ☐ Background info/speaking notes for emcee and speakers: _____

FOOD & BEVERAGE

- ☐ Refreshments required (yes, no): _____
- ☐ Catering provider (Aramark, other): _____
- ☐ Type of food/beverage
 - ☐ Breakfast
 - ☐ Lunch
 - ☐ Dinner
 - ☐ Reception
 - ☐ BBQ
 - ☐ Coffee service
 - ☐ Light refreshments
- ☐ Liquor – Special Event forms needed (if not Aramark)? _____
 - ☐ Submitted to Security
 - ☐ Serve it Right designated person _____
- ☐ Date due for finalized RSVPs/#s/nutritional needs: _____
- ☐ Menu and multiple quotes (requested, received): _____
- ☐ Rentals required (tables, chairs, china, glassware, linens): _____
- ☐ Rentals provider: _____



GENERAL SET-UP

- ☐ Work Request completed (date submitted, file #): _____
- ☐ Attached event outline? _____
- ☐ Attached map/diagram/set-up notes? _____
 - ☐ Podium?
- ☐ Event lay out (stage, tables, chairs, linens, other): _____
- ☐ Seating plan required (yes, no, staff involved): _____
- ☐ Rentals needed? Provider? (tents, cocktail tables, linens, other): _____
- ☐ Extra landscaping/recycling/garbage bins needed: _____
- ☐ Welcome/reception table? _____
- ☐ Name tags (yes, no): _____
- ☐ PA system needed? _____
- ☐ Extra AV needed (TV, laptop, projector, screens, lighting, web cast, other): _____
 - ☐ Pick up location/details:
 - ☐ Power source:
 - ☐ Party pack required:
- ☐ Music (yes, no, live, DJ, iPod, special play list): _____
- ☐ Décor (flowers, other, source): _____
- ☐ Security arrangements: _____
- ☐ Extra First aid (yes, no, who): _____
- ☐ Parking arrangements: _____
- ☐ Transportation arrangements: _____
- ☐ Other requirements: _____

NOTES FOR WORK ORDERS (IT AND FACILITIES)



SUPPLY RUN

- ☐ Shopping list created: _____
- ☐ Time/date determined: _____
- ☐ Locations: _____
- ☐ Receipts collected and tracked: _____

PRE-EVENT ADMINISTRATION

- ☐ Guest lists printed: _____
- ☐ Nametags printed and prepared: _____
- ☐ Extra nametags: _____
- ☐ Back up prepared: _____
- ☐ Event supplies prepared: _____
- ☐ Signage prepared: _____
- ☐ Contracts printed: _____
- ☐ Phone numbers of external suppliers noted: _____
- ☐ Cheque/payment for presenters: _____
- ☐ Assessment method chosen:
 - ☐ Survey (In person? Online?)
 - ☐ Focus group
 - ☐ Debrief meeting
 - ☐ Other _____
 - ☐ None
- ☐ Target group:
 - ☐ Volunteers
 - ☐ Staff
 - ☐ Partners
 - ☐ Attendees
 - ☐ Other _____
- ☐ Assessment materials prepared: _____

POST-EVENT ADMINISTRATION

- ☐ Photos received and distributed as necessary: _____
- ☐ Assessment results compiled and reviewed: _____
- ☐ Assessment results forwarded (to whom?): _____
- ☐ Debrief meetings as required: _____
- ☐ Debrief notes prepared: _____
- ☐ Invoices received and sent to appropriate departments: _____
- ☐ Remove posters and signage: _____



- ☐ Remove from website: _____
- ☐ Final budget completed: _____
- ☐ Event file finalized: _____

FINANCIAL

- ☐ PCard reconciled with correct speed charts (yes, no, date completed): _____
- ☐ AMEX reconciled with correct speed charts (yes, no, date completed): _____
- ☐ JVs (Completed? JV number? Date sent?): _____
- ☐ Qreqs (Completed? Q number? Date submitted?): _____
- ☐ Tracked in spending spreadsheets (yes, no, date completed): _____
- ☐ Any follow up required? _____