

## EVENT PLANNING CHECKLIST

### Pre-planning

Event

Type of Event		
<input type="checkbox"/> Building Dedication	<input type="checkbox"/> Groundbreaking	<input type="checkbox"/> Ribbon Cutting
<input type="checkbox"/> Historical Marker	<input type="checkbox"/> Naming Ceremony	<input type="checkbox"/> Honorary Ceremony
<input type="checkbox"/> Other		

Sponsoring Unit

Departmental Contact		
Name		
Campus Address		
Email	Phone	Fax

Billing Information	
Job Number	
Account Number	

Level of Service	
<input type="checkbox"/> Lead Role (Coordinate the entire event)	
<input type="checkbox"/> Support Role (Implement select event planning services)	
<input type="checkbox"/> Subordinate Role (Provide services for other event planners)	

Date of Event	
Alternative Date(s)	

Time of Event	

Expected Audience	

Estimated Attendance

Establish Preliminary Budget	
TOTAL	
<i>*Indicates items for direct bill to client</i>	

Planning Committee Members			
Name	Department	Email Address	Phone Number

Planning Committee Meeting Dates		

Submit Confirmation of Services Letter			
Date sent to:	<input type="checkbox"/> Client	<input type="checkbox"/> Marketing	<input type="checkbox"/> Communications

Submit Special Event Alert		
Date sent to:	<input type="checkbox"/> Marketing	<input type="checkbox"/> Communications

## Twelve Weeks Prior to Event

Order Plaques/Building Letters		
Contact		
Designer		
Email	Phone	Fax
Text		
Supplier		
Service Representative		
Email	Phone	Fax
Installation Date		Specific Location
Approval	1.	2.
		3.

Order Gifts/Awards/Commemoratives		
Item		
Design		
Designer		
Email	Phone	Fax
Supplier		
Service Representative		
Email	Phone	Fax
Approval	1.	2.
		3.

## Six Weeks Prior to the Event

Coordinate Calendars of Key Stakeholders	
Texas A&M System	
University/Health Science Center/Agencies	
Elected Officials	
Chamber of Commerce	
Campus Planning Committee	

Confirm Speakers and Other Stage Party Members	
Obtain Names and Addresses of Guests	
Contact	
File Type	Labels Provided: <input type="checkbox"/> Yes <input type="checkbox"/> No
Date Needed	

Save-the-Date Notices			
Designer			
Email	Phone	Fax	
Postcard Design			
Printer			
Service Representative			
Email	Phone	Fax	
Quantity			
Paper	Ink	Size	Order #
Approval	1.	2.	3.
Mail Date			

Secure Location	
Inclement Weather Site:	

Design Invitations			
Designer			
Email	Phone	Fax	
Invitation Design			
Printer			
Service Representative			
Email	Phone	Fax	
Quantity			
Paper	Ink	Size	Order #
Inserts	<input type="checkbox"/> Map	<input type="checkbox"/> Parking Pass	<input type="checkbox"/> Reserved Seating
	<input type="checkbox"/> Reply Card/Envelope	<input type="checkbox"/> Other	
Approval	1.	2.	3.
Date Ordered			

Design Program			
Designer			
Email	Phone	Fax	
Invitation Design			
Printer			
Service Representative			
Email	Phone	Fax	
Quantity			
Paper	Ink	Size	Order #
Approval	1.	2.	3.
Date Ordered			

Additional Design Elements (Posters, banners, reserved seating signs, directional signage, etc.)			
Designer			
Email	Phone	Fax	
Printer			
Service Representative			
Email	Phone	Fax	
Quantity			
Paper	Ink	Size	Order #
Approval	1.	2.	3.
Date Ordered			

Stage Party Members			
<input type="checkbox"/> Letter inviting individuals to be part of Stage Party			
Approval	1.	2.	3.
Mail Date			
<input type="checkbox"/> Maintain RSVP List for Stage Party		<input type="checkbox"/> Final Stage Party Count	
<input type="checkbox"/> Seating Chart Diagram			
<input type="checkbox"/> Stage Party Signs for Lineup			



<b>Safety/Security</b>	
Contact: University Police	
Contact: Fire Marshal	
Contact: City Permits	
Contact: County Permits	
<input type="checkbox"/> Inside	<input type="checkbox"/> Outside
Number of Security Officers	
Specific Location(s)	

<b>Food/Refreshments</b>	
Contact:	
Location	
Number of Guests	
Menu	
Number of Tables	
Number of Servers	
Tablecloths/Skirts	Colors
Centerpieces	Quantity
	Colors

<b>Photography</b>	
Contact	
Photographer	Phone:
Identify target shots and provide to photographer	
<input type="checkbox"/> Photo CD	<input type="checkbox"/> Gallery
	Quantity
<input type="checkbox"/> Prints	Quantity
<input type="checkbox"/> Albums	Quantity

<b>Videography</b>	
Contact	
Videographer	Phone
Client Copy	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Quantity
Archival Copy	<input type="checkbox"/> Yes <input type="checkbox"/> No

### Three Weeks Prior to the Event

Mail Invitations		
<input type="checkbox"/> Merge Mailing List		Date
<input type="checkbox"/> Address Envelopes or Labels		Date
<input type="checkbox"/> Assemble Invitations and Inserts		Date
<input type="checkbox"/> Stuff		Date
<input type="checkbox"/> Seal		Date
Stamps	Quantity	Cost
<input type="checkbox"/> Stamp		Date
<input type="checkbox"/> Mail		Date

Develop RSVP System			
RSVP by Date			
Contact	Email	Phone	
RSVP Count to:	<input type="checkbox"/> Client	<input type="checkbox"/> Caterer	<input type="checkbox"/> Theatre Complex <input type="checkbox"/> Other

Develop Program			
Designer			
Email	Phone	Fax	
Program Design			
Printer			
Service Representative			
Email	Phone	Fax	
Quantity			
Paper Selection		Ink	
Size	Fold	Order #	
Program Outline (details will vary with type of event)			



<b>Coordinate Speeches (Focus for Speakers' Comments)</b>		
Contact		
Contact		
Contact		
Contact Board of Regents, Vickie Spillers, 845-9600		
Contact Office of the Chancellor, KrisAnn Everett, 458-6000		
Provide speakers with program outline and background information		
Speaker		
Speaker		
Speaker		
Speaker		
Speaker		

<b>Develop Script for Master of Ceremony</b>		
Person Responsible		
<input type="checkbox"/> Obtain appropriate approvals		

<b>Floral Arrangements</b>		
Florist		
Service Representative		
Email	Phone	Fax
<input type="checkbox"/> Podium Piece		
<input type="checkbox"/> Centerpieces	Quantity	Location
<input type="checkbox"/> Corsages	Quantity	Guest(s)
<input type="checkbox"/> Boutonnieres	Quantity	Guest(s)

<b>Special Accommodations</b>		
Contact for list of Resources, Disability Services		
<input type="checkbox"/> Hotel		
<input type="checkbox"/> Campus Escorts		
<input type="checkbox"/> Transportation		
<input type="checkbox"/> Parking		
<input type="checkbox"/> Portable Restrooms		
<input type="checkbox"/> Disability Accessibility		
<input type="checkbox"/> Hearing Impaired		
<input type="checkbox"/> Meals		
<input type="checkbox"/> Other		

Miscellaneous Materials/Supplies	
<input type="checkbox"/> Shovels for Groundbreaking	Quantity
<input type="checkbox"/> Hardhats	Quantity
<input type="checkbox"/> Scissors for Ribbon-cutting	Quantity
<input type="checkbox"/> Stage Party List/Diagram	
<input type="checkbox"/> Stage Party Signs	Quantity
<input type="checkbox"/> Office supplies	
<input type="checkbox"/> Emergency kit	

### Two Weeks Prior to the Event

Publicity	
Contact:	
<input type="checkbox"/> Advance Press Releases/Web Announcements	
<input type="checkbox"/> Follow-up Press Releases/Updated Web Information	
<input type="checkbox"/> Press Kits	Quantity
<input type="checkbox"/> Flyers	
<input type="checkbox"/> Paid Advertisements	
<input type="checkbox"/> Other	

Emergency Procedures		
Department	Name	Emergency Number

Staff/Volunteer Assignments	
<input type="checkbox"/> Prepare detailed list of responsibilities for each role listed below.	
Assignment	Staff Member
Material Delivery	
Set up and take down	
Walk-thru	
Greeters	
Spotters	
Stage Party Check-in	
Sign-in/Registration	
Runners	
Media point-of-contact	
Photography point-of-contact	

### One Week Prior to the Event

Finalize and Print Program
<input type="checkbox"/>

<b>Personalized Nametags/Place Cards</b>
<input type="checkbox"/> Nametags
<input type="checkbox"/> Place Cards

<b>Pack an Emergency Kit</b>		
<input type="checkbox"/> First Aid Kit	<input type="checkbox"/> Paper	<input type="checkbox"/> Phone Numbers
<input type="checkbox"/> Scissors	<input type="checkbox"/> Tape	<input type="checkbox"/> Other
<input type="checkbox"/> Pens	<input type="checkbox"/> Stapler	<input type="checkbox"/> Other
<input type="checkbox"/> Pencils	<input type="checkbox"/> Paper Clips	<input type="checkbox"/> Other

<b>Confirm</b>	
<input type="checkbox"/> Facility Set-up	<input type="checkbox"/> Parking
<input type="checkbox"/> Equipment	<input type="checkbox"/> Transportation
<input type="checkbox"/> Security	<input type="checkbox"/> Security
<input type="checkbox"/> Catering	<input type="checkbox"/> Photos
<input type="checkbox"/> Floral	<input type="checkbox"/> Video
<input type="checkbox"/> Stage Party	<input type="checkbox"/> Other

**Day Prior to the Event**

<b>Deliver all Materials to Venue</b>
<input type="checkbox"/>

<b>Confirm Staff Assignments</b>
<input type="checkbox"/>

**Day of the Event**

<b>Meet with Staff and Review Assignments</b>		
Date	Time	Location

<b>Final Walk Through</b>
<input type="checkbox"/> Verify room layout
<input type="checkbox"/> Check directional signage
<input type="checkbox"/> Parking and transportation review
<input type="checkbox"/> Coordinate with traffic control/security
<input type="checkbox"/> Verify seating for Stage Party
<input type="checkbox"/> Other
<input type="checkbox"/> Other

**Follow-up After the Event**

<b>Select Photos/Send Photo Gallery to Client (if requested)</b>	
Date Sent	Date Selections Received

<b>Assemble /Deliver Albums</b>	
<i>Include invitation, program and clips</i>	
Date Assembled	Date Delivered

<b>Assemble /Deliver DVD</b>	
Date Assembled	Date Delivered

<b>Invoice Client</b>	
<input type="checkbox"/> Estimate Prepared/Submitted	<input type="checkbox"/> Estimate Approved
Date Invoiced	Date Payment Received

<b>Committee/Client Debriefing</b>		
Date	Time	Location
Notes		

<b>Assessment</b>
<input type="checkbox"/> Distributed
<input type="checkbox"/> Returned
<input type="checkbox"/> Compiled

<b>Send Thank You Notes</b>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>