

TIMELINE & 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

Activity	Person Responsible	Due Date
Create and order save-the-date cards, invitations, response cards and related materials (i.e. map, etc), OR meet with Director of related materials (i.e. map, etc), OR meet with Director of Communication or vendors to discuss print materials needed forevent.		
Meet with Director of Communication to discuss publicity		
Draft program agenda		
Determine signage requirements (pedestrian & vehicle)		
MAGIC on-site registration procedures		
Constant Contact Registration set up		
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

Activity	Person Responsible	Due Date
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

Activity	Person Responsible	Due Date
Review staffing assignments for day of event: set-up and clean-up		
Meet on site with operational staff such as transportation officials and ushers to discuss responsibilities		
Work with Director of Communication on copy for internal and external publicity		
Meet with vendors on site, follow up on all orders		
Meet with caterer on site to discuss setup and final menu		
Send out attendance update to planning team/key players		

One Weeks before the event

Activity	Person Responsible	Due Date
Send caterer final count		
Print programs, name badges, seating charts, place cards, etc.		
Confirm arrangements with vendors		

24 Hours before the event

Activity	Person Responsible	Due Date
Contact caterer to verify all arrangements		
Cut & Sign Checks for Speakers, Caterer, Etc.		
Confirm security requirements		
Ensure tent, chairs, tables, stage, podium are in place		

After the event

Clean up: kitchen, vacuuming		
Replace Equipment, tables, chairs, decorations		
Removal of Trash & Recycle		
Financial: Gather All Receipts, Documentation, Registration Data, Budget Update		
Thank You's/Acknowledgement Letters to: Sponsors, Volunteers, Speakers-Presenters, Media		
Post-Event Publicity		
Conduct Post-Event Survey: what did people enjoy/what can be improved		
Follow-up Communication with Event Participants		
Reach out to Event Participants - thank & promote ongoing programs		
Conduct a thorough evaluation		