

EVENT PLANNING CHECKLIST

This checklist is designed to allow you to successfully plan events and track your progress. Each checklist is intended to be used for one event. It includes multiple areas and assignments in which are typical of planning a successful event. Not all categories may be necessary, and some may need to be added. This checklist should be used as an outline.

Event/Program Title: _____ Event Date: _____

Location: _____ Time: _____

Sponsor(s): _____

Coordinator(s): _____

	Assigned To	Target Date	When Done
PROGRAM DEVELOPMENT			
1. Determine program goals and objectives			
2. Look at possible featured attractions (i.e., speaker)			
3. Decide on featured attraction (cost vs. availability)			
4. Verify qualifications (e.g., CPR trainer)			
5. Confirm event with attraction			
6. Arrange transportation, parking, campus escort as needed			
7. Determine program format			
8. Type list of members on the program committee and distribute to all members			

	Assigned To	Target Date	When Done
FINANCES			
1. Estimate expenses and outline budget with treasurer			
2. Request funding from ASI CAB Funding (forms must be typed, and filled out completely, submitted at least three (3) weeks prior or five (5) weeks prior if requesting funding for artist, speaker, or any other service provider to the event, unless the event will be occurring in the first three (3) weeks of the school year. https://www.csusb.edu/asi/finances/club-allocation-budget-cab			
4. Attend CAB Funding Workshop (Contact ASI for Dates!)			
5. Present to ASI CAB Board			
6. Determine co-sponsored, if applicable			
7. Service Contract/Artist Agreement, if applicable			
8. Set-up ticket sales, if applicable			
9. Change and cash box/money bag, if applicable			

	Assigned To	Target Date	When Done
SCHEDULING			
1. Schedule event space/room through EMS (be sure to add on campus advisor as secondary contact) https://eventmanagement.csusb.edu/emswebapp/			
2. Fill out off CoyoteConnection Event Form located on your organization's page under the "Events" Tab (+Create Event Button) https://csusb.campuslabs.com/engage/			
3. Events that meet certain criteria must meet with the Special Events Committee*			

	Assigned To	Target Date	When Done
PUBLICITY			
1. Target audience (on campus and/or community)			
2. TWO Months Out: <ul style="list-style-type: none"> • Graphics Request: ASI • Video Request • Coyote Chronicle Request: • Coyote Radio Announcement: • Send Save the Date Email • Establish Street Team Dates (On the Floor Marketing) <ul style="list-style-type: none"> ○ Tabling: <ul style="list-style-type: none"> ▪ SMSU Area ▪ College of Education ▪ Jack Brown ▪ Arts and Letters ▪ Natural Sciences ▪ Social and Behavioral ▪ Front & Back of Library ▪ Physical Science ▪ Rec Center • Establish Social Media Campaign dates <ul style="list-style-type: none"> ○ Twitter: ○ Facebook: ○ Instagram: ○ Snapchat: 			
3. ONE Month Out: <ul style="list-style-type: none"> • Printing Request • CoyoteConnection Event Form (Created via Event Form) • Banner Hang Request • Newsletter Publication • Marquee Request: Strategic Communication; news@csusb.edu • Video Screen Request (TV Monitors) • Social Media Campaign Execution <ul style="list-style-type: none"> ○ Weekly (2x) All platforms ○ Online ○ Website ○ RSVP ○ Landing Page ○ Create an Event 			

<p>4. THREE Weeks Out:</p> <ul style="list-style-type: none"> • Street Team Execution <ul style="list-style-type: none"> ○ Bulletin Board Posting ○ Sandwich Board Setup and Posting ○ Put Banner Up • Social Media Campaign Execution <ul style="list-style-type: none"> ○ Weekly (3x) All platforms 			
<p>5. TWO Weeks Out:</p> <ul style="list-style-type: none"> • Street Team Execution <ul style="list-style-type: none"> ○ Flyer pass out and marketing (12-2pm) (4-6pm) • Social Media Campaign Execution <ul style="list-style-type: none"> ○ Weekly (5x) All platforms • Send flyer to OSE to be feature on the Leaders Newsletter 			

	Assigned To	Target Date	When Done
SAFETY			
1. Notification of University Police (security, money, parking, etc.)			
2. Obtain single event insurance, if applicable			
3. Review vendor license and insurance			
4. Wavier forms			
5. Do a safety walk through (unstable stage, no open walk way, etc.)			
6. Plan for entrance and exit capability			
7. Purchase wrist bands			

	Assigned To	Target Date	When Done
FOOD/REFRESHMENTS/DECORATIONS			
1. Plan menu or refreshments			
2. Place order with Sodexo (campus dining services) or clear off-campus food through Sodexo https://csusbcatering.catertrax.com/catering@csusb.edu			
3. Review EHS Food Safety Guidelines <ul style="list-style-type: none"> EHS Food Event Notification form is built-in to the CoyoteConnection Event Form. Just make sure to indicate that you are serving/selling food on that form. 			
4. Purchase: <ul style="list-style-type: none"> Balloons Ribbon Nametags, Centerpieces Tablecloths Door prizes, etc. 			

	Assigned To	Target Date	When Done
PROGRAM DAY			
1. Designate meet up time			
2. Directional signs to event			
3. Verify equipment and room set up			
4. Registration/welcome table (cash box/change, sign-in sheet, name tags, pens, etc.)			
5. Volunteers to welcome people			
6.. Introduction of speaker or artist to audience			
7. Check food/refreshments			
8. Role assignment: <ul style="list-style-type: none"> Set up crew Clean up crew Check in table 			

	Assigned To	Target Date	When Done
WRAP-UP SECTION			
1. Create itemized expense report			
2. Complete all reimbursement requests and submit all receipts			
3. Deposit any funds that need to be deposited with Student Financial Services			
4. Evaluate the program for next year's planner			
5. Send thank-you notes and acknowledgements			
6. Pay invoices			

	Assigned To	Target Date	When Done
ADDITIONAL TASKS			



Event Timeline

Low Risk Event(s)

Criteria:

- Closed, General Meetings
- Members of Organization Only
- Located on CSUSB Campus

Example(s):

- General Body Meeting where only organization members are invited, Chapter meetings, etc.

Timeline: 7-10 Business Days (1-2 Weeks)

2 Weeks Prior to the Event:

- Reserve Space via the Event Management System
- Submit Event Form via Coyote Connection
- Notify Members of Organization of Meeting via messages or flyers

1 Week Prior to Event:

- Remind Members of Organization about Meeting
- Develop a Meeting Agenda that may include icebreakers or an activity

Day of Event:

- E-mail Agenda to Members (Eco-Friendly Option)
- Send another reminder

After Event:

- Start planning for next meeting!

Medium Risk Event(s)

Feel free to meet with OSE and schedule an Event Planning Consultation!

Criteria:

- Open, General Meetings
- CSUSB Community is invited
- Located on CSUSB Campus

Example(s):

- Fundraisers, speaker events, events with food, public meetings, workshops, trainings, small-public events, lecture, etc.

Timeline: 10-15 Business Days (2-3 Weeks)

3 Weeks Prior to the Event:

- Plan out what you want your event to be
- Reserve Space via the Event Management System
- Submit Event Form via Coyote Connection (Food Event Notification form is built in)
- Create Marketing Plan
- Apply for CAB Funding if applicable
- If food will be present, receive Sodexo's first right of refusal before contacting outside vendors/bringing in your own food items

2 Week Prior to Event:

- Send Flyer to OSE to be added to the Leaders Listserv
- Follow up with OSE to see status of Event Form (if not yet approved!)
- *Once Event Form is approved* Begin Promoting via Social Media
- Meet with Crystal to see if anything needs to be purchase for your event

1 Week Prior to Event:

- Promote via Social Media
- Start working on your "Day of" Schedule/Timeline to determine responsibilities of members and officers
- Confirm participation with vendors/campus partners

Day of Event:

- Check space to make sure that everything is in order
- E-mail Agenda to Members (Eco-Friendly Option)
- Send another reminder

After Event:

- Debrief Meeting of how the event went
- Deposit any funds that you may have raised, submit any reimbursement forms, etc.
- Start planning next event!

High Risk Event(s)*

Will require a meeting with the Special Events Committee

There are a lot of small components and details when it comes to planning a large, high-risk event. Feel free to meet with OSE and schedule an Event Planning Consultation!

Criteria:

- Open to the Public
- More than 100 people in Attendance
- Involves Physical Activity/Attractions
- May or may not involve Minors
- Controversial, Sensitive Topics

Example(s):

- Conferences, Carnivals, Concerts, Festivals, All-Day Events, etc.

Timeline: 1-3 Months Prior to the Event

1-2 Months Prior to the Event:

- Plan out what you want your event to be
- Reserve Space via the Event Management System
- Submit Event Form via Coyote Connection (Food Event Notification form is built in)
- Attend Special Events Meeting
- Create Marketing Plan
- Apply for CAB Funding if applicable
- If food will be present, receive Sodexo's first right of refusal before contacting outside vendors/bringing in your own food items

3-4 Weeks Prior to Event:

- Send Flyer to OSE to be added to the Leaders Listserv
- Follow up with OSE for any questions
- *Once Event Form is approved* Begin Promoting via Social Media
- Meet with Crystal to see if anything needs to be purchase for your event
- Hire Vendors/Speakers/etc.
- Provided any necessary details to campus partners such as Facilities, University Police Department, Environmental Health & Safety, Special Events & Guest Services, Santos Manuel Student Union, etc.

1 Week Prior to Event:

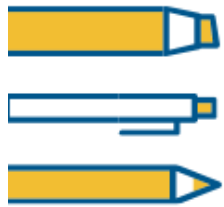
- Promote via Social Media
- Start working on your "Day of" Schedule/Timeline to determine responsibilities of members and officers
- Confirm participation with vendors/campus partners

Day of Event:

- Check space to make sure that everything is in order
- E-mail Agenda to Members (Eco-Friendly Option)
- Send another reminder

After Event:

- Debrief Meeting of how the event went
- Deposit any funds that you may have raised, submit any reimbursement forms, etc.
- Start planning next event!



Office of Student Engagement Risk Assessment

- Closed, General Meeting
- Only Members of Organization
- Located on CSUSB

Example:
General Body Meeting
for Club/Organization
Members Only

Low Risk



Medium Risk

- Examples: Fundraisers, Speaker Events, Events with Food/Food Sales, Public Meetings, Small-Public Events (Less than 100 people), Recruitment, Workshops/Trainings, Lectures, etc.
- Open, General Meeting
 - Invites CSUSB Community (Students, Faculty, Staff)



High Risk

- Open to the Public
 - More than 100 People in Attendance
 - Involves Physical Activity/Attractions
 - Involves Minors
 - Controversial, Sensitive Topics
- Examples: Conferences, Carnivals, Concerts, Festivals, All-Day Events, etc.
Must Attend a Special Events Meeting

How to Access Event Form on CoyoteConnection



- Step #1: Log onto CoyoteConnection
- Step #2: Go to Organization Page
- Step #3: Select "Manage Organization"
- Step #4: Select "Events" from Menu
- Step #5: Click "Create Event" Button



Office of Student Engagement Student Club & Organization Event Process

Step #1:



Submit your Request for Space via the Event Management System

Make sure that your Advisor is listed as the secondary contact



Step #2:

Submit your Event Form via CoyoteConnection

Required for Medium & High Risk Events

Types of Events:

Low Risk: Closed, General Meeting

Medium Risk: Open, General Meeting

High Risk: Events with several other components such as large crowds, outdoors, minors, physical activity, open to the public, etc.



Step #3 (For High Risk Events Only!)

OSE will reach out to schedule this meeting!



Meet with the Special Events Committee to Discuss your Event



Step #4:



Event Form & Space has been approved by OSE when all other campus partners approve