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 Target When

To Date Done

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| **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 |  |  |  |

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| **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/sites/csusb/files/CAB_funding_request_form_fill-2.pdf> |  |  |  |
| 3. Present to ASI CAB Board  <https://www.csusb.edu/sites/csusb/files/CAB%20-%20Policy%20Final%202017.pdf> |  |  |  |
| 4. Determine co-sponsored, if applicable |  |  |  |
| 5. Service Contract/Artist Agreement, if applicable |  |  |  |
| 6. Set-up ticket sales, if applicable |  |  |  |
| 7. Change and cash box/money bag, if applicable |  |  |  |

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| **SCHEDULING** |  |  |  |
| 1. Schedule event space/room through EMS (be sure to add on campus advisor as secondary contact)  <http://studentunion.csusb.edu/template/files/scheduling/ems_students.pdf> |  |  |  |
| 2. Fill out off campus event notification, if applicable  <https://orgsync.com/1146/forms/264945> |  |  |  |
| 3. Event space reservations for 150 guests or more require a special events meeting with Clubs/Organizations Advisor before approved |  |  |  |

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| **PUBLICITY** |  |  |  |
| 1. Target audience (on campus and/or community) |  |  |  |
| 2. TWO Months Out:   * Graphics Request: ASI * Video Request * Coyote Chronicle Request: Linda Sand X75815; [lsand@csusb.edu](mailto:lsand@csusb.edu) * Coyote Radio Announcement: Lacey Kendall X75781; [lacey@csusb.edu](mailto:lacey@csusb.edu) * Send Save the Date Email * Establish Street Team Dates (On the Floor Marketing)   + Tabling:     - 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   + Twitter:   + Facebook:   + Instagram:   + Snapchat: |  |  |  |
| 3. ONE Month Out:   * Printing Request * Banner Hang Request * Newsletter Publication * Marquee Request: Strategic Communication; [news@csusb.edu](mailto:news@csusb.edu) * Video Screen Request (TV Monitors) * Social Media Campaign Execution   + Weekly (2x) All platforms   + Online   + Website * OrgSync   + RSVP   + Landing Page   + Create an Event |  |  |  |
| 4. THREE Weeks Out:   * Street Team Execution   + Bulletin Board Posting   + Sandwich Board Setup and Posting   + Put Banner Up * Social Media Campaign Execution   + Weekly (3x) All platforms includes OrgSync |  |  |  |
| 5. TWO Weeks Out:   * Street Team Execution   + Flyer pass out and marketing (12-2pm) (4-6pm) * Social Media Campaign Execution   + Weekly (5x) All platforms includes OrgSync   HYPERLINK |  |  |  |

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| **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 |  |  |  |

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| **FOOD/REFRESHMENTS/DECORATIONS** |  |  |  |
| 1. Plan menu or refreshments |  |  |  |
| 2. Place order with Sodexo (campus dining services) or clear off-campus food through Sodexo |  |  |  |
| 3. Review EHS Food Safety Guidelines and fill out Food Event Notification form  <https://www.csusb.edu/ehs/forms/food-event-notification> |  |  |  |
| 4. Purchase:   * Balloons * Ribbon * Nametags, * Centerpieces * Tablecloths * Door prizes, etc. |  |  |  |

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| **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:   * Set up crew * Clean up crew * Check in table |  |  |  |

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| **WRAP-UP SECTION** |  |  |  |
| 1. Create itemized expense report  <https://www.csusb.edu/sites/csusb/files/UniversityClubItemizedExpenseReport.pdf> |  |  |  |
| 2. Complete all reimbursement requests and submit all receipts |  |  |  |
| 3. Complete Event Report Summary (Greeks)  <https://orgsync.com/1146/forms/280552> (volunteer/philanthropy form)  <https://orgsync.com/1146/forms/280555> (member participation form) |  |  |  |
| 4. Evaluate the program for next year’s planner |  |  |  |
| 5. Send thank-you notes and acknowledgements |  |  |  |
| 6. Pay invoices |  |  |  |

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| **ADDITIONAL TASKS** |  |  |  |
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