

Event Planning Checklist

This basic checklist will assist your group in planning a successful event.
 It may not have all of the specifics that your event requires, so
 brainstorming prior to starting your event preparation is essential.

Type of Event:

- Conference/Camp
- Lecture
- Meeting
- Panel Discussion

- Book Signing
- Symposium
- Workshop
- Other _____

Name of Event: _____

Date: _____ Time: _____

Location: _____

Purpose of Event: _____

_____ Expected Attendance: _____

Contact Person: _____

Office/Department/Organization: _____

Address: _____

Email: _____

Phone: _____ Fax: _____

Committee Members:

Name	Phone	Email
------	-------	-------

Name	Phone	Email
------	-------	-------

Name	Phone	Email
------	-------	-------

Name	Phone	Email
------	-------	-------

Name	Phone	Email
------	-------	-------

Register Event

- Complete the *Events Information Form* by going to <https://rfwccl.wufoo.com/forms/events-information-form/>

Budget

- Complete the Budget Planning Worksheet (attached)

Facility Reservations

To reserve a venue please go to <http://ems.muw.edu/VirtualEMS/> or contact the Office of Resources Management at 662-329-7126.

- Location(s) for event (consider capacity requirements)
- Location for reception
- Location(s) for breakfast/lunch/dinner
- Inclement weather plans
- Accommodations for Speaker (Puckett House, Plymouth Bluff)

Speaker/Panelists

- Invitation
- Background information
- Speakers'/panelists' agent contact information, if any, including telephone numbers and email
- Honorarium vs. Paid as an Employee
- Required paperwork (*contact Human Resources at 662-329-7222*)
 - W9 form
 - Sponsored Programs Personnel Action Form (SPPAF) vs. Personnel Action Form (PAF)
 - Employee vs. Independent Contractor classification checklist
 - Signed contract
- Electronic copy of presentation in advance
- Handouts
- Campus escort(s)
- Travel plans
- Accommodations
- Ground transportation between airport and campus
**Request a vehicle through Resources Management at 662- 329-7126 or http://web2.muw.edu/images/docs/resources_management/vehiclerequestform.pdf*
- Campus shuttle transportation
- Parking/parking passes
- Identify individuals to introduce speakers/panelists at event and/or moderate panel
- Thank you/honorarium and expense reimbursement

Special Guests

- Invitations
- Travel plans
- Campus escorts
- Accommodations
- Ground transportation between airport and campus
**Request a vehicle through Resources Management at 662-329-7126 or http://web2.muw.edu/images/docs/resources_management/vehiclerequestform.pdf*
- Campus shuttle transportation
- Parking/parking passes
- Follow-up, if necessary, after event

Disability Access and Accommodations for Speakers, Special Guests, and Participants

- Access accommodation notice on announcements, registration form, and/or invitations, when appropriate. (Example: *Please list any disability accommodations needed.*)
- Accessible location
- Special transportation
- Lowered podium
- Wheelchair access to stage
- Special seating section
- Sign language interpreter/communication assistance
- Alternatives to print materials

Invitations

- Design/printing (refer to *The W's branding guidelines* at <http://web3.muw.edu/branding>)
- Guest list
- Enclose campus map or include map on invitation (<http://web3.muw.edu/campusmap>)
- Response deadline date
- Person/telephone number/email address to whom to respond
- Internal distribution, if appropriate
- Extra invitations for archive files
- Name and telephone number of contact person, particularly if invitation is a conference registration form

Dinners/Receptions

- Budget
- Catering request (*contact Sodexo Campus Services at 662-329-7411*)
**Sodexo Campus Services MUST cater all events*
- Menu-planning (mindful of dietary restrictions)
- Meal tickets/prices (cash and check only)
- Number of tables and chairs for dining (*contact Resources Management at 662-329-7126*)
- Number of chairs at head table (*contact Resources Management at 662-329-7126*)
- Linens (*contact Sodexo Campus Services at 662-329-7411*)
 - tablecloths
 - skirting
 - napkins
- Flowers
- Final guest count
- Place cards
- Host/emcee
- Schedule of evening/timeline
- Podium and microphone (*contact Resources Management at 662-329-7126*)
- Photographer (*contact University Relations at 662-329-7119*)
- Coat racks

Registration

- Tables/chairs (*contact Resources Management at 662-329-7126*)
- Tablecloths/skirting (*contact Sodexo Campus Services at 662-329-7411*)
- Name tags
- Sign-in/out sheets
- Conference/meeting information packet
 - Agenda
 - Campus map
 - Parking pass
 - Pen/pencil
 - Notepad
 - Evaluation form (example attached)
 - CEU/SEMI Credit forms (*contact Office of Professional Learning at 662-329-7288*)
- Gifts/takeaways (if desired)
- MUW promotional items
- Information table
- Trash receptacles
- Coat racks
- Event Resource Supply Box (attached)

MUW Promotional

- Tables/chairs (*contact Resources Management at 662-329-7126*)
- Tablecloths/skirting (*contact Sodexo Campus Services at 662-329-7411*)
- Display board(s)
- Brochures/print materials
- Promotional giveaways

Book Signing

- Bookstore providing book/service
- Location for book signing
- Podium and microphone, if required
- Table for books/chair/linens/flowers
- Table/chair for author
- Cashier
- Cashbox/cash for change
- Distribution of funds after event

Publicity

- Contact University Relations at 662-329-7119
 - Press release
 - Facebook
 - Twitter
 - Instagram
 - News and Events on The W website
 - University Event Calendar
 - The Spectator
 - WMUW
 - Local media (tv, radio, newspaper)
 - Flyers/posters
- Community websites/newsletters/listserves (*contact the Columbus-Lowndes Chamber of Commerce at 800-748-8882*)

AV Needs

- Laptop
- iPad
- Wi-Fi access information (*contact ITS at 662-329-7282*)
- Data projector (VGA compatible)
- Overhead projector
- CD player
- DVD player
- Interactive white board (*Examples: Promethean, SMART*)
- Extension cords

Video-/Audio-Taping Request

- Permission of speaker/presenter
- Posting/distribution of taped presentation after event

Sound Needs (*contact Facilities Management at 662-329-7396*)

- Podium with microphone
- Lavalier (small clip-on microphone)
- Microphones for panel
- Sound board

Lighting Needs (*contact Facilities Management at 662-329-7396*)

- Special requests

Platform/Room setup

- Water bottles/glasses
- Table (panel discussions)
- Tablecloths/skirting (*contact Sodexo Campus Services at 662-329-7411*)
- Chairs (on stage)
- Microphones
- Physical layout (*notify Resources Management at 662-329-7126*)
- Podium spray (flowers)
- MUW signage
- Bulletin boards/chalk or dry erase boards/easels/large writing pads/interactive white board (*determine whether required and take into consideration when reserving space*)

Reserved Seating

- Reserved special-guest seating
- Press section
- Special-needs section (interpreter, other)
- Reserved seating signage

Additional Staff Assistance

- Public safety/parking (*contact University Police at 662-241-7777*)
- Custodial services (*contact Facilities Management at 662-329-7396*)
- Technical support *(*contact ITS at 662-329-7282 and/or Facilities Management at 662-329-7396*)
- Hang banner at front gate *(*contact Facilities Management at 662-329-7396*)
- Student ushers/greeters* (*contact Student Life at 662-241-6974*)
- HVAC (*contact Facilities Management at 662-329-7396*)

*Request MUST be made at least 2 weeks prior to event.

After the Event

- Complete the *Event Participation Form* by going to <https://rfwccl.wufoo.com/forms/event-participation-form/>
- Thank you notes
 - Speaker/Panelists
 - Special guests
 - Volunteers
- Compile/review participant evaluations
- Complete Post Event Debrief and/or Post Event Evaluation (attached)
- Process paperwork for paying all invoices (*contact the Office of University Accounting at 662-329-7210*)

BUDGET PLANNING WORKSHEET

ANTICIPATED INCOME

Event Budget \$ _____

Admission Fees \$ _____

Co-Sponsors (list below) \$ _____

Grant Income \$ _____

Name of Grant

Other Income \$ _____

TOTAL \$ _____

ANTICIPATED EXPENSES

Facilities Rental \$ _____

Food \$ _____

Lodging \$ _____

Publicity \$ _____

Speaker Fees/Honoraria \$ _____

Supplies \$ _____

Technical Support \$ _____

Travel \$ _____

Security \$ _____

Films License or Permits \$ _____

Registration Fees \$ _____

Other \$ _____

TOTAL \$ _____

EVENT RESOURCE SUPPLY BOX LIST

EVENT

- Extra blank name tags
- Extra blank seating cards
- Extra meal tickets
- Extra campus maps
- Extra evaluation forms
- Extra handouts
- Door stop
- Table signs/stands
- Flipchart/easel/markers
- Dry erase markers/cleaner
- Wireless remote
- Extra extension cord
- Phone numbers for facilities personnel

REPAIRS

- Double-sided tape
- Goo gone
- Lint roller
- Safety pins
- Velcro strips
- WD-40
- Hot glue gun/glue sticks

OFFICE

- Binder clips
- Paper clips
- Correction tape
- Glue sticks
- Pens
- Pencils
- Post-It Notes
- Rubber bands
- Scissors
- Sharpie
- Staple remover
- Stapler
- Calculator
- Receipt book
- Cash box
- Flash drive
- Camera

MISCELLANEOUS ITEMS

- Advil/Tylenol
- Band-Aids/Neosporin
- Batteries
- Lighter

POST EVENT EVALUATION

1. Did we meet our goals/objectives with this event?
2. Did we meet our budgetary goals?
3. Did we have enough volunteers for this event?
4. What could we have done differently to make the event better/more productive?
5. Did we have enough advertising/PR for the event? How could we have made this better?
6. Did we execute the event in a professional manner?
7. Did we face any group conflict with this event? What was it? How was it resolved? What could we have done differently?
8. Would we bring these speakers/panelists in again? Was it worth it?
9. Would we execute a similar event in the future? What changes would we make?

10. How does this event allow us to grow as a group, department, and campus? Was it an overall good program?

POST EVENT DEBRIEF

WHAT WORKED ABOUT THE EVENT

PRE-EVENT

- Planning Process

- Goals and Objectives

- Publicity and Printed Materials

- Internal/External Committees

- Fundraising

DAY-OF

- Overall Experience

- Venue

- Catering and Service

- Décor

- Program

AREAS FOR IMPROVEMENT

PRE-EVENT

- Planning Process
 - Issue:

 - Solution:

 - Goals and Objectives
 - Issue:

 - Solution:

 - Publicity and Printed Materials
 - Issue:

 - Solution:

 - Internal/External Committees
 - Issue:

 - Solution:

 - Fundraising
 - Issue:

 - Solution:
-

AREAS FOR IMPROVEMENT

DAY-OF

- Venue
 - Issue:

 - Solution

- Catering and Services
 - Issue:

 - Solution:

- Décor
 - Issue:

 - Solution:

- Program
 - Issue:

 - Solution:

How could the event process be changed to make it more successful?

What should be remembered for next time?

