**EVENT PLANNING CHECKLIST**

Event: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_ Time: \_\_\_\_\_\_\_\_\_\_\_\_\_\_­­­\_\_\_\_\_\_\_\_\_

Location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Purpose: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**PRIOR TO EVENT**

* Determine type of event (fundraising, social, recruiting, general meeting, etc.)
* Determine event goals and outcomes
* Estimate attendance and target audience
* Select a date and time through Ad Astra
  + *Make sure to check University calendars before planning!*
* Create budget (see back for example)

Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_ Deadline \_\_\_\_\_\_\_\_

* Reserve the space/location for your event using Ad Astra (schedule.owu.edu)
* Submit the event registration form on Engage

Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_ Deadline \_\_\_\_\_\_\_\_

* Contact housekeeping, Public Safety, AVI, athletics, Media Center
* Reserve vans through Engage

Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_ Deadline \_\_\_\_\_\_\_\_

* Submit request to WCSA (if necessary) for funding
* All requests submitted to WCSA MUST BE at least three weeks prior to event

Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_ Deadline \_\_\_\_\_\_\_\_

* Submit the contract request form on Engage for entertainment/vendor contracts
* Submit check requests, purchase orders, driving contracts, etc.

Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_ Deadline \_\_\_\_\_\_\_\_

* ADVERTISE!
  + Posters, banners, OWU Daily
  + Chalk JAYwalk & approved areas
  + HWCC televisions, sandwich boards

Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_ Deadline \_\_\_\_\_\_\_\_

* Shopping
  + Silverware/cups
  + Plates/napkins
  + Decorations
  + Cashbox
  + Rider requirements, water etc.

Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_ Deadline \_\_\_\_\_\_\_\_

* Create an assessment to evaluate attendees experience at the event
* This can be a paper or electronic form

**1 WEEK BEFORE EVENT**

* Confirm with event speaker/artist/entertainment
* Arrival times \_\_\_\_\_ Departure time \_\_\_\_\_
* Transportation needs \_\_\_\_\_

Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_ Deadline \_\_\_\_\_\_\_\_

* If applicable, pick up checks from the SIO

Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_ Deadline \_\_\_\_\_\_\_\_

* Confirm and remind volunteers of duties

Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_ Deadline \_\_\_\_\_\_\_\_

* Confirm parties, i.e. catering, PS, housekeeping, etc.

Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_ Deadline \_\_\_\_\_\_\_\_

* Distribute day of event schedule and volunteer duties to group/volunteers

**DAY OF EVENT**

* Arrive to event early or time assigned
* Meet vendors at the event and assist with set-up.
* Check in with volunteers to ensure they fulfill assigned duties.
* Make proper introductions to guests/speakers. Check that guests have everything they need, i.e. water, snacks
* Greet guests at the door with a smile and warm welcome
* Provide necessary payments after the performance/event
* Distribute and collect assessments
* Clean-up when finished and return all borrowed supplies

**POST EVENT**

Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_ Deadline \_\_\_\_\_\_\_\_

* Write thank you notes to necessary partners

Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_ Deadline \_\_\_\_\_\_\_\_

* Deposit any money collected at event

Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_ Deadline \_\_\_\_\_\_\_\_

* Evaluate event with a follow-up meeting
  + Review assessments from attendees
  + What went well?
  + What can be improved?
  + Upload notes to Engage for easy access for future events

Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_ Deadline \_\_\_\_\_\_\_\_

* Include all vendor/restaurant/coaches names/etc. address and phone numbers for future reference.

**ADDIONTAL POST EVENT REFLECTION QUESTIONS**

* Did you meet your goals and expectations?
* Did you meet your budget goals?
* Did you have enough volunteers to adequately cover the event?
* What can you improve for a more effective or productive event next time?
* How does the program allow you and your organization to grow?
* Did you have adequate advertising?
* Was advertising done in an effective time frame?
* Were there any conflicts that were not handled or resolved appropriately or professionally? How can these issues be handled differently next time?
* Would you consider having this speaker/performer return? Why or why not?
* Would you consider sponsoring another program similar to this one?
* What organizational changes could be made next time?

**BUDGET PLANNING**

|  |  |
| --- | --- |
| **EXPENSES** | **COST** |
| Space Reservation Fee | $ |
| Food | $ |
| Lodging | $ |
| Advertising | $ |
| Contract Fees (speaker,performer,etc.) | $ |
| Transportation | $ |
| Supplies | $ |
| Decorations | $ |
| Public Safety | $ |
| Housekeeping | $ |
|  | $ |
|  | $ |
|  | $ |
|  | $ |
|  | $ |
| **TOTAL** | $ |

|  |  |
| --- | --- |
| **ANTICIPATED INCOME** | **AMOUNT** |
| Admission Fee | $ |
| Donation | $ |
| T-Shirts | $ |
|  | $ |
|  | $ |
|  | $ |
|  | $ |
|  | $ |
| **TOTAL** | $ |

**CONTACT LIST**

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