EVENT PLANNING CHECKLIST

Pre-planning

Event

Type of Event		
☐ Building Dedication	☐ Groundbreaking	☐ Ribbon Cutting
☐ Historical Marker	☐ Naming Ceremony	☐ Honorary Ceremony
☐ Other		

Sponsoring Unit

Departmental Contact		
Name		
Campus Address		
Email	Phone	Fax

Billing Information
Job Number
Account Number

Level of Service
☐ Lead Role (Coordinate the entire event)
☐ Support Role (Implement select event planning services)
☐ Subordinate Role (Provide services for other event planners)

Date of Event		
Alternative Date(s)		

Time of Event

Expected Audience

Estimated Attendance

Establish Preliminary Budget	
TOTAL	
**Indicates items for direct bill to client*	

Planning Committee Members			
Name	Department	Email Address	Phone Number

Planning Committee Meeting Dates		

Submit Confirmation of Services Letter			
Date sent to:	☐Client	☐Marketing	☐Communications

Submit Special Event Alert		
Date sent to:	☐Marketing	☐Communications

Twelve Weeks Prior to Event

Order Plaques/Building Letters		
Contact		
Designer		
Email	Phone	Fax
Text		
Supplier		
Service Representative		
Email	Phone	Fax
Installation Date	Specific Location	
Approval 1.	2.	3.

Order Gifts/Awards/Commemoratives		
Item		
Design		
Designer		
Email	Phone	Fax
Supplier		
Service Representative		
Email	Phone	Fax
Approval 1.	2.	3.

Six Weeks Prior to the Event

Coordinate Calendars of Key Stakeholders	
Texas A&M System	
University/Health Science Center/Agencies	
Elected Officials	
Chamber of Commerce	
Campus Planning Committee	

Confirm Speakers and Other Stage Party Members	

Obtain Names and Addresses of Guests	
Contact	
File Type	Labels Provided: ☐Yes ☐No
Date Needed	

Save-the-Date Notices			
Designer			
Email	Phone	Fax	
Postcard Design			
Printer			
Service Representative			
Email	Phone	Fax	
Quantity			
Paper	Ink	Size	Order #
Approval	1.	2.	3.
Mail Date			

Secure Location
Inclement Weather Site:

Design Invitations			
Designer			
Email	Phone	Fax	
Invitation Design			
Printer			
Service Representative			
Email	Phone	Fax	
Quantity			
Paper	Ink	Size	Order #
Inserts	☐Map	☐Parking Pass	☐Reserved Seating
	☐Reply Card/Envelope	☐Other	
Approval	1.	2.	3.
Date Ordered			

Design Program			
Designer			
Email	Phone	Fax	
Invitation Design			
Printer			
Service Representative			
Email	Phone	Fax	
Quantity			
Paper	Ink	Size	Order #
Approval	1.	2.	3.
Date Ordered			

Additional Design Elements (Posters, banners, reserved seating signs, directional signage, etc.)			
Designer			
Email	Phone	Fax	
Printer			
Service Representative			
Email	Phone	Fax	
Quantity			
Paper	Ink	Size	Order #
Approval	1.	2.	3.
Date Ordered			

Stage Party Members	
☐Letter inviting individuals to be part of Stage Party	
Approval 1.	2. 3.
Mail Date	
☐Maintain RSVP List for Stage Party	☐Final Stage Party Count
☐Seating Chart Diagram	
☐Stage Party Signs for Lineup	

Room/Site Set-up	
Contact:	
☐Stage Size	☐Sound
☐Podium w/University Seal	☐Audiovisual Equipment
☐Seal	☐Screen
☐Flags	☐Floor Microphones
☐Number of Stage Party Chairs	☐Portable Microphones
☐Number of Audience Chairs	☐Audience Microphones
☐Number of Reserved Chairs	☐Press Feeds
☐Number of Serving Tables	☐Easels
☐Number of Display Tables	☐Drapes
☐Number of Check-in Tables	☐Signage
☐Number of Guest Book Tables	☐Tent
☐Meeting Area for Stage Party	☐Ribbon-cutting Set-up
☐Overflow Area	☐Unveiling Set-up
☐Podium Greenery	☐Water Set-up
☐Other Greenery	☐Other

Site Preparation
Contact: Landscape Maintenance
☐Work Request
☐Sweep Street
☐Mow
☐Check for Fire Ants
☐Soil for Groundbreaking
Contingency Plan for Inclement Weather

Parking/Transportation/Traffic Control	
Contact: Transportation Services	
Contact: Bus Operations	
Contact: Vehicle Rental,	
Contact: Golf Cart Loans,	
Reserved Parking Lot #	
Stage Party Parking Lot #	
Directional Signage	
Number of Barricades	Locations
Bus Operations Reservations	
Van Rentals for VIPs and Staff	

Safety/Security	
Contact: University Police	
Contact: Fire Marshal	
Contact: City Permits	
Contact: County Permits	
☐Inside	☐Outside
Number of Security Officers	
Specific Location(s)	

Food/Refreshments		
Contact:		
Location		
Number of Guests		
Menu		
Number of Tables		
Number of Servers		
Tablecloths/Skirts		Colors
Centerpieces	Quantity	Colors

Photography		
Contact		
Photographer		Phone:
Identify target shots and provide to photographer		
☐Photo CD	☐ Gallery	Quantity
☐Prints		Quantity
☐Albums		Quantity

Videography			
Contact			
Videographer			Phone
Client Copy	☐ Yes	☐ No	Quantity
Archival Copy	☐ Yes	☐ No	

Three Weeks Prior to the Event

Mail Invitations		
☐Merge Mailing List		Date
☐Address Envelopes or Labels		Date
☐Assemble Invitations and Inserts		Date
☐Stuff		Date
☐Seal		Date
Stamps	Quantity	Cost
☐Stamp		Date
☐Mail		Date

Develop RSVP System				
RSVP by Date				
Contact	Email		Phone	
RSVP Count to:	☐Client	☐Caterer	☐Theatre Complex	☐Other

Develop Program		
Designer		
Email	Phone	Fax
Program Design		
Printer		
Service Representative		
Email	Phone	Fax
Quantity		
Paper Selection	Ink	
Size	Fold	Order #
Program Outline (details will vary with type of event)		

Coordinate Speeches (Focus for Speakers' Comments)
Contact
Contact
Contact
Contact Board of Regents, Vickie Spillers, 845-9600
Contact Office of the Chancellor, KrisAnn Everett, 458-6000
Provide speakers with program outline and background information
Speaker
Speaker
Speaker
Speaker
Speaker

Develop Script for Master of Ceremony
Person Responsible
☐Obtain appropriate approvals

Floral Arrangements		
Florist		
Service Representative		
Email	Phone	Fax
☐Podium Piece		
☐Centerpieces	Quantity	Location
☐Corsages	Quantity	Guest(s)
☐Boutonnieres	Quantity	Guest(s)

Special Accommodations
Contact for list of Resources, Disability Services
☐Hotel
☐Campus Escorts
☐Transportation
☐Parking
☐Portable Restrooms
☐Disability Accessibility
☐Hearing Impaired
☐Meals
☐Other

Miscellaneous Materials/Supplies	
☐Shovels for Groundbreaking	Quantity
☐Hardhats	Quantity
☐Scissors for Ribbon-cutting	Quantity
☐Stage Party List/Diagram	
☐Stage Party Signs	Quantity
☐Office supplies	
☐Emergency kit	

Two Weeks Prior to the Event

Publicity	
Contact:	
☐Advance Press Releases/Web Announcements	
☐Follow-up Press Releases/Updated Web Information	
☐Press Kits	Quantity
☐Flyers	
☐Paid Advertisements	
☐Other	

Emergency Procedures		
Department	Name	Emergency Number

Staff/Volunteer Assignments	
☐Prepare detailed list of responsibilities for each role listed below.	
Assignment	Staff Member
Material Delivery	
Set up and take down	
Walk-thru	
Greeters	
Spotters	
Stage Party Check-in	
Sign-in/Registration	
Runners	
Media point-of-contact	
Photography point-of-contact	

One Week Prior to the Event

Finalize and Print Program
☐

Personalized Nametags/Place Cards
☐Nametags
☐Place Cards

Pack an Emergency Kit		
☐First Aid Kit	☐Paper	☐Phone Numbers
☐Scissors	☐Tape	☐Other
☐Pens	☐Stapler	☐Other
☐Pencils	☐Paper Clips	☐Other

Confirm	
☐Facility Set-up	☐Parking
☐Equipment	☐Transportation
☐Security	☐Security
☐Catering	☐Photos
☐Floral	☐Video
☐Stage Party	☐Other

Day Prior to the Event

Deliver all Materials to Venue
☐

Confirm Staff Assignments
☐

Day of the Event

Meet with Staff and Review Assignments		
Date	Time	Location

Final Walk Through
☐Verify room layout
☐Check directional signage
☐Parking and transportation review
☐Coordinate with traffic control/security
☐Verify seating for Stage Party
☐Other
☐Other

Follow-up After the Event

Select Photos/Send Photo Gallery to Client (if requested)	
Date Sent	Date Selections Received

Assemble /Deliver Albums	
Include invitation, program and clips	
Date Assembled	Date Delivered

Assemble /Deliver DVD	
Date Assembled	Date Delivered

Invoice Client	
☐Estimate Prepared/Submitted	☐Estimate Approved
Date Invoiced	Date Payment Received

Committee/Client Debriefing		
Date	Time	Location
Notes		

Assessment
☐Distributed
☐Returned
☐Compiled

Send Thank You Notes
☐
☐
☐
☐
☐
☐
☐
☐