



## UBC EVENT PLANNING CHECKLIST

### CONTACTS

- Event coordinator: \_\_\_\_\_
- Host: \_\_\_\_\_
- Originator/department: \_\_\_\_\_

### BASIC PLANNING ELEMENTS

- Name of Event: \_\_\_\_\_
- Event Date and Time: \_\_\_\_\_
- Theme week? Name of week: \_\_\_\_\_
- Location/Venue: \_\_\_\_\_
- Budget Amount: \_\_\_\_\_ Drafted? \_\_\_\_\_
- Speed chart: \_\_\_\_\_
- Accounts (#, for what?): \_\_\_\_\_
- Budget contact: \_\_\_\_\_
- Other events this day? \_\_\_\_\_
- Purpose of event: \_\_\_\_\_
- Type of event:
  - Event
  - Meeting
  - Workshop
  - Conference
- Target audience: \_\_\_\_\_
- Number of guests anticipated: \_\_\_\_\_
- Invitee Authorization Form required?  
Prepared? \_\_\_\_\_

### PLANNING TEAM AND VOLUNTEERS

- Planning committee members: \_\_\_\_\_
- Required # of volunteers: \_\_\_\_\_
- Volunteer coordinator: \_\_\_\_\_
- Review checklists, assign responsibilities and timelines: \_\_\_\_\_

### VENUE

- Venue selected (yes, no, name, date confirmed): \_\_\_\_\_
- Set up and tear down time required: \_\_\_\_\_
- Time venue booked for: \_\_\_\_\_
- Campus Security Form (required? submitted?) \_\_\_\_\_



- Tenting required (yes, no, provider): \_\_\_\_\_
- Rain/poor weather contingency plans made (yes, no, what): \_\_\_\_\_

**REGISTRATION, INVITATIONS, GUEST LIST**

- Registration set-up? Early bird/Deadlines? \_\_\_\_\_
- Invitations/save the date needed? \_\_\_\_\_
- Print or email invitations? \_\_\_\_\_
- Guest List provided by? By when? \_\_\_\_\_
- Individual invite or with guest? \_\_\_\_\_
- Parking pass or map needed? \_\_\_\_\_
- RSVP's and contact: \_\_\_\_\_

**MARKETING/COMMUNICATIONS**

- Communications webform (yes, no, date submitted): \_\_\_\_\_
- Client marketing plan created? \_\_\_\_\_
- Invitation/save the date drafted/ designed? \_\_\_\_\_
- Invitation/save the date sent? Date: \_\_\_\_\_
  - Delegates
  - Students
  - Staff
  - Faculty
- Material for website (yes, no, date submitted): \_\_\_\_\_
  - Info page
  - Registration form
  - Schedule/map
- Internal communications (yes, no, date submitted): \_\_\_\_\_
  - Exchange
  - TVs
  - Electronic sign
  - Events page
  - Campus online calendars
- External/off campus communications (yes, no, date submitted): \_\_\_\_\_
  - Press release
- Castanet events page posting (yes, no, date completed): \_\_\_\_\_
- Blog/hootsuite/FB (yes, no, date completed): \_\_\_\_\_
- Poster distribution (yes, no, date distributed): \_\_\_\_\_
- Event signage (yes, no, where, who): \_\_\_\_\_
- UBCO.tv invitation (yes, no, date sent): \_\_\_\_\_



Photography required at event (yes, no, photographer): \_\_\_\_\_

**MARKETING DELIVERABLES**

- Poster (yes, no, date due): \_\_\_\_\_
- Web icon (yes, no, date due): \_\_\_\_\_
- Logo/emblem (yes, no, date due): \_\_\_\_\_
- .eps file (yes, no, date due): \_\_\_\_\_
- Invites (yes, no, date due): \_\_\_\_\_
- Program (yes, no, date due): \_\_\_\_\_

**PRINTED PROGRAMS/HANDOUTS/GIVEAWAYS/AWARDS**

- Printed program (yes, no): \_\_\_\_\_
- Printed program (content provided by? When?): \_\_\_\_\_
- Printed program (design, printing, delivery): \_\_\_\_\_
- Other handouts: \_\_\_\_\_
- Giveaways (yes, no, what): \_\_\_\_\_
- Giveaways (staff responsible, source, budget, delivery): \_\_\_\_\_
- Awards (yes, no, what): \_\_\_\_\_
- Awards (staff responsible, source, budget, delivery): \_\_\_\_\_

**EVENT PROGRAM/SPEECHES**

- Event script created? Shared? \_\_\_\_\_
- Is there a speaking program? \_\_\_\_\_
- Speakers/roles (Drafted? Confirmed?): \_\_\_\_\_
- Emcee: \_\_\_\_\_
- Keynote Speaker: \_\_\_\_\_
- Event Outline: Drafted? \_\_\_\_\_ Approved? \_\_\_\_\_ Circulated? \_\_\_\_\_
- Background info/speaking notes for emcee and speakers: \_\_\_\_\_

**FOOD & BEVERAGE**

- Refreshments required (yes, no): \_\_\_\_\_
- Catering provider (Aramark, other): \_\_\_\_\_
- Type of food/beverage
  - Breakfast
  - Lunch
  - Dinner
  - Reception



- BBQ
- Coffee service
- Light refreshments
- Liquor – Special Event forms needed (if not Aramark)? \_\_\_\_\_
  - Submitted to Security
  - Submitted to liquor control board
  - Serve it Right designated person \_\_\_\_\_
- Date due for finalized RSVPs/#s/nutritional needs: \_\_\_\_\_
- Menu and multiple quotes (requested, received): \_\_\_\_\_
- Rentals required (tables, chairs, china, glassware, linens): \_\_\_\_\_
- Rentals provider: \_\_\_\_\_

**GENERAL SET-UP**

- Work Request completed (date submitted, file #): \_\_\_\_\_
- Attached event outline? \_\_\_\_\_
- Attached map/diagram/set-up notes? \_\_\_\_\_
  - Podium?
- Event lay out (stage, tables, chairs, linens, other): \_\_\_\_\_
- Seating plan required (yes, no, staff involved): \_\_\_\_\_
- Rentals needed? Provider? (tents, cocktail tables, linens, other): \_\_\_\_\_
- Extra landscaping/recycling/garbage bins needed: \_\_\_\_\_
- Welcome/reception table? \_\_\_\_\_
- Name tags (yes, no): \_\_\_\_\_
- PA system needed? \_\_\_\_\_
- Extra AV needed (TV, laptop, projector, screens, lighting, web cast, other): \_\_\_\_\_
  - Pick up location/details:
  - Power source:
  - Party pack required:
- Music (yes, no, live, DJ, iPod, special play list): \_\_\_\_\_
- Décor (flowers, other, source): \_\_\_\_\_
- Security arrangements: \_\_\_\_\_
- Extra First aid (yes, no, who): \_\_\_\_\_
- Parking arrangements: \_\_\_\_\_
- Transportation arrangements: \_\_\_\_\_
- Other requirements: \_\_\_\_\_

**NOTES FOR WORK ORDERS (IT AND FACILITIES)**



**SUPPLY RUN**

- Shopping list created: \_\_\_\_\_
- Time/date determined: \_\_\_\_\_
- Locations: \_\_\_\_\_
- Receipts collected and tracked: \_\_\_\_\_

**PRE-EVENT ADMINISTRATION**

- Guest lists printed: \_\_\_\_\_
- Nametags printed and prepared: \_\_\_\_\_
- Extra nametags: \_\_\_\_\_
- Back up prepared: \_\_\_\_\_
- Event supplies prepared: \_\_\_\_\_
- Signage prepared: \_\_\_\_\_
- Contracts printed: \_\_\_\_\_
- Phone numbers of external suppliers noted: \_\_\_\_\_
- Cheque/payment for presenters: \_\_\_\_\_
- Assessment method chosen:
  - Survey (In person? Online?)
  - Focus group
  - Debrief meeting
  - Other \_\_\_\_\_
  - None
- Target group:
  - Volunteers
  - Staff
  - Partners
  - Attendees
  - Other \_\_\_\_\_
- Assessment materials prepared: \_\_\_\_\_

**POST-EVENT ADMINISTRATION**

- Photos received and distributed as necessary: \_\_\_\_\_
- Assessment results compiled and reviewed: \_\_\_\_\_
- Assessment results forwarded (to whom?): \_\_\_\_\_
- Debrief meetings as required: \_\_\_\_\_
- Debrief notes prepared: \_\_\_\_\_
- Invoices received and sent to appropriate departments: \_\_\_\_\_
- Remove posters and signage: \_\_\_\_\_



- Remove from website: \_\_\_\_\_
- Final budget completed: \_\_\_\_\_
- Event file finalized: \_\_\_\_\_

**FINANCIAL**

- PCard reconciled with correct speed charts (yes, no, date completed): \_\_\_\_\_
- AMEX reconciled with correct speed charts (yes, no, date completed): \_\_\_\_\_
- JVs (Completed? JV number? Date sent?): \_\_\_\_\_
- Qreqs (Completed? Q number? Date submitted?): \_\_\_\_\_
- Tracked in spending spreadsheets (yes, no, date completed): \_\_\_\_\_
- Any follow up required? \_\_\_\_\_