

Event Planning Checklist

(Events with more than 20 participants)

Event Goals

What is this event trying to accomplish?

Who is your audience? What will keep them interested?

Event Management Plan

Who is hosting the event?

Who is coordinating the logistics?

What is the budget?

Can this be a “green event”?

Who is the point of contact during the event? Back up contact?

Is a contact/important numbers list needed?

What date/time will be best for this event?

How many guests, speakers, staff need to be accounted for?

What deadlines need to be established?

What are the risks? How can they be avoided? Plan B?

Is planning consultation needed with Gillings Facilities Office, AV Services, OSA (Room reservations)

Venue

How much space is needed?

What is the date of the event? What other events are on the schedule for nearby locations?

Indoor or outdoor? What is the backup plan if it rains?

What room/event space options are available?

Will after-hours access need to be requested?

Is available lighting adequate?

What is the seating plan? Will everyone be comfortable? What ADA options are available?

Will existing furniture need to be removed/rearranged?

Will there be different locations for breakout sessions, meals, etc.?

Safety plan?

Event Planning Checklist

(Events with more than 20 participants)

Parking/Wayfinding

What parking options are available? Are ADA options available?

Is a parking monitor needed?

Is there any signage needed to guide guests to the event?

Are there any physical challenges to the layout?

Are guests moving from one location to another? Will they be guided by an usher or signage?

Facilities Set-up

How many event tables are needed?

Will linens be required? White linens for 6ft tables are available through the Gillings Facilities Office.

Are extra chairs needed?

Do extra tables and chairs need to be ordered from Housekeeping Services?

Housekeeping or Grounds walkthrough needed in advance? (Pressure wash? Blow leaves?

Housekeeping may be required for after-hours events)

Have these services been requested of the Gillings Facilities Office?

Sound / Music / AV

What equipment will be needed for the event?

Has equipment been requested from AV Services?

Does host need training on equipment prior to event?

Will AV rep be on site? Communication plan?

What type of lighting is needed for video recordings, etc.?

Will there be a photo booth set up?

Will music be playing in the background? What genre?

Will there be additional entertainment? What additional support is needed?

Catering / Food & Beverage

Where will catering be set up?

What will the menu be? What special dietary restrictions need to be considered?

Any special themes relevant to the program?

What service-ware should the caterer bring? Reuseable? Disposable?

Event Planning Checklist

(Events with more than 20 participants)

Who will monitor waste throughout the event? Are extra housekeeping supplies needed?

Is an alcohol permit needed for the event?

Invitations

Who are the guests?

What is the timeline for sending out invitations and receiving the RSVP?

What type of invitation will be used? Paper? E-vite? LCD screen? Social media?

Is there a web page for the event?

Are directions, parking options, accessibility information included?

Do out of town guests need to be provided local town information?

Décor & Signage

Is there a theme?

What type of décor will be used?

Will restrooms, kitchens, other spaces need special touches?

Is any special signage required for the space?

Do banners need to be placed in advance?

Photography/Communications

Is a photographer needed on site?

Lighting requirements? Pre-event walkthrough needed?

Will Communications Office team member be present for photos, social media posts?

Registration / Welcome / Staffing

Is a registration table needed? Are department or Facilities linens needed?

Who has guest list? Printed or electronic?

Are nametags being used? Blanks for on-site?

Are program packets being distributed? Giveaway items?

How many staff needed for greeting/ushering, checking in?

Will there be rush times? How will that impact layout?

Event Planning Checklist

(Events with more than 20 participants)

End of event/Clean up

Who will clean up after the event? How many people are needed?

Clean up catering, signage, décor, empty trash, lost and found items.

Debrief/Lessons Learned

Thank you notes

Lessons Learned meeting (for recurring/large events)

What was successful?

What needs improvement?

Were goals achieved?

Event Planning Checklist

(Events with more than 20 participants)

| | | |
|--|------------------|--------------|
| Name of Event | | |
| Date/Beginning and End Time of Event | | |
| Location of Event | | |
| Event Host | | |
| Logistics Coordinator/Event Manager | | |
| Action Items | Completed | Notes |
| Event Management <ul style="list-style-type: none"> <input type="checkbox"/> Determine budget <input type="checkbox"/> Create event planning document <input type="checkbox"/> Set timeline/deadlines <input type="checkbox"/> Create contact/important numbers list <input type="checkbox"/> Consult with Gillings Facilities Office, AV Services, OSA (Room reservations) <input type="checkbox"/> Determine “green-ability” of event | | |
| Venue – Gillings School of Global Public Health <ul style="list-style-type: none"> <input type="checkbox"/> Check space availability via Outlook calendar <input type="checkbox"/> Reserve space (wait for confirmation email) <input type="checkbox"/> Consult Facilities Office for planning support <input type="checkbox"/> Review ADA needs | | |
| Set up – Facilities Office <ul style="list-style-type: none"> <input type="checkbox"/> Discuss layout options with Facilities Office <input type="checkbox"/> Request extra tables, chairs and linens <input type="checkbox"/> Request after-hours building access (if applicable) <input type="checkbox"/> Request extra trash and recycling bins <input type="checkbox"/> Contact Facilities Office for weekend event Housekeeping Services (required) <input type="checkbox"/> Request pre-event Housekeeping/Grounds services | | |
| Audio/Visual Needs <ul style="list-style-type: none"> <input type="checkbox"/> Determine what AV equipment is needed <input type="checkbox"/> Request AV Services <input type="checkbox"/> Is training on system needed? <input type="checkbox"/> Extra electrical requirements | | |

Event Planning Checklist

(Events with more than 20 participants)

| | | |
|---|------------------|--------------|
| Name of Event | | |
| Date/Beginning and End Time of Event | | |
| Location of Event | | |
| Event Host | | |
| Logistics Coordinator/Event Manager | | |
| Action Items | Completed | Notes |
| Catering <ul style="list-style-type: none"> <input type="checkbox"/> Research catering options <input type="checkbox"/> Purchase service-ware, if not provided <input type="checkbox"/> Consider special dietary requirements of guests <input type="checkbox"/> Decide final menu <input type="checkbox"/> Waste management plan for event | | |
| Safety <ul style="list-style-type: none"> <input type="checkbox"/> Security alerted (after-hours event) <input type="checkbox"/> Safety concerns addressed <input type="checkbox"/> First aid kit/plan | | |
| Staffing <ul style="list-style-type: none"> <input type="checkbox"/> Extra required <input type="checkbox"/> Staff to meet and greet guests | | |
| Photography/Communications <ul style="list-style-type: none"> <input type="checkbox"/> Contact Communications Team for event photography, LCD posts, branding policies | | |
| Gifts/Giveaways <ul style="list-style-type: none"> <input type="checkbox"/> Determine/order gifts/giveaways <input type="checkbox"/> Provide copies of publications | | |
| Décor/Ambiance <ul style="list-style-type: none"> <input type="checkbox"/> Floral arrangements, balloons, centerpieces <input type="checkbox"/> Background music <input type="checkbox"/> Lighting | | |
| Housekeeping/Grounds <ul style="list-style-type: none"> <input type="checkbox"/> Pre-event walkthrough <input type="checkbox"/> Extra supplies on hand during event | | |

Event Planning Checklist

(Events with more than 20 participants)

| | | |
|---|------------------|--------------|
| Name of Event | | |
| Date/Beginning and End Time of Event | | |
| Location of Event | | |
| Event Host | | |
| Logistics Coordinator/Event Manager | | |
| Action Items | Completed | Notes |
| Post-event Clean Up <ul style="list-style-type: none"><input type="checkbox"/> Catering clean up<input type="checkbox"/> Shut down AV equipment, music, etc.<input type="checkbox"/> Remove signage<input type="checkbox"/> Return space to original set up | | |
| Debrief <ul style="list-style-type: none"><input type="checkbox"/> Schedule Lessons Learned meeting<input type="checkbox"/> Thank you notes | | |