

# SUGGESTED EVENT PLANNING TIMELINE

## SIX MONTHS - ONE YEAR IN ADVANCE

- Determine the goal of your event and select the appropriate format for your message
- Outline a budget estimate and seek appropriate approval
- Select the date, after review of calendars for key participants, the University, and community
- Discuss roles and responsibilities with other supporting units
- If requesting the president's participation, contact President's Office
- Select and reserve a venue, and obtain agreement in writing
- Choose a theme
- Develop a rain plan (if scheduled for an outdoor venue)
- Select a caterer and hold initial meeting to discuss event
- Reserve hotel accommodations, if needed
- Outline décor needs
- Choose and order favors/give away items
- Select and order any plaques, awards, etc.
- Reserve rental equipment needed from external vendors
- Confirm event speakers, including a master of ceremonies

## VENUE

- ◆ How many people can your facility accommodate?
- ◆ What is the rental cost?
- ◆ Is a deposit required for the reservation?
- ◆ May I see a sample contract?
  - ◇ Be sure to check the cancellation policy, insurance requirements and liability clauses
- ◆ What is the standard and included rental cost?
  - ◇ Tablecloths and napkins, silverware, glassware, plates, centerpieces, setup and tear down, etc.
- ◆ Are there specific delivery and set-up times?
- ◆ What is the availability and cost of parking?
- ◆ Is there a coat check available? (if needed)
- ◆ When is the final guest count due?
- Select guest list categories and begin master guest list
- If dignitaries are to be invited, notify the Office of University Events for assistance
- Write copy and design save the date mailing
- If planning to serve alcohol, seek appropriate permission (see liability section)
- Plan audio/visual presentation and hire necessary audio visual support
- Develop plan for publicity with your communications director
- Discuss parking/transportation needs with WVU Transportation Office
- Develop plan for any online components

## THREE–SIX MONTHS IN ADVANCE

- Write copy and design printed invitations, seek approval before printing
- Finalize and get approval for guest list
- Confirm program speaking order, adhering to protocol

### SPEAKER REQUEST PROCESS

Many chapter/group events are enhanced enough through the presence of a notable speaker. Please consider a few things when selecting and planning for a speaker at your event.

- ◆ Speaker expenses -- travel, room and board (possibly including spouse)
- ◆ All speaker expenses should be built into the chapter/group event registration cost in order to break even on the event
- ◆ The alumni association is happy to assist the chapter/group with promoting the speaker through an e-mail
- Determine how invitations will be mailed (through your unit or other entity?)
- Mail save the date notifications (3-4 months before event)
- Check in with program participants and offer suggestions for their remarks
- Request bio information and photograph/headshot of speaker for publicity
- Add your event to the online University event calendar (available from the WVU Homepage)
- Confirm event entertainment, and obtain agreement in writing
- Confirm event menu with caterer

### FOOD AND CATERING

- ◆ Is there an exclusive caterer or can we bring in our own?
  - ◇ Is there an extra cost to bring in your own?
  - ◇ Do you have a preparation area available for an outside vendor?
  - ◇ Are there food and beverage minimums?
- ◆ Are waiver forms required for an outside vendor?
- ◆ Is there alcohol permitted on the premises? (consult liability section)
  - ◇ Do we need to sign an alcohol contract?
  - ◇ Is alcohol supplied by a caterer, or can we bring it in ourselves?
- ◆ Does the caterer provide a certain percentage over the guaranteed number of guest?
- Select and meet with a florist
- Develop security plan with University Police
- Request/hire a photographer
- Develop a layout of your venue and determine where specific activities will take place
- Confirm support staffing
- Request volunteer staffing
- Continue to update website and social media with event details as needed

## TWO MONTHS IN ADVANCE

- Submit work order to Facilities Management for set up/logistical needs/materials
- Complete guest list with addresses and prepare for mailing
- Send out invitations 4-6 weeks before the event
- Finalize décor
- Make hotel accommodations and transportation plans for out-of-town guests/dignitaries
- Create signage needed for event (banners, directional, etc.)
- Finalize program and send to printer for production
- Create menu cards if needed
- Contact the Office of Disability Services for assistance with accommodations
- Prepare draft for printed program

## TWO—FOUR WEEKS IN ADVANCE

- Track RSVPs as they come back to your office
- Prepare registration packets
- Continue event publicity
- Send detailed instructional packet to presenters, including directions, parking info, etc.
- Finalize arrangements with all vendors, including A/V, catering, material suppliers
- Write speeches and introductions; seek approval
- Giveaways should be received and prepped for distribution
- Create table numbers
- Create seating diagrams of room
- Visit venue for walk through
- Receive printed program, pull at least 2 for your file
- Develop master timeline for event day(s)

## ONE WEEK IN ADVANCE

- Contact “No Replies” on the RSVP list to avoid unexpected attendees
- Print guest list in alphabetical order and also by table number for easy reference
- Create name tags, place cards, seating chart and table numbers
- Provide detailed advance packet to hosts with VIP backgrounds and other pertinent info
- Collect plaques, awards and other presentation materials
- Finalize remarks and create master script book for podium (tabbed for each speaker)
- Send electronic version of script to each presenter for final review
- Send final instructions to volunteers
- Review responsibilities with event support staff
- Confirm guest count with catering
- Prepare event box with needed supplies (see Mini Event Box below)

## EVENT DAY

- Arrive at least 2 hours early
- Wear comfortable shoes!
- Bring final copies of all planning documents for reference
- Bring vendor forms for entertainment payment
- Bring script book for podium
- Greet volunteers and brief them on their responsibilities
- Examine venue with signage, favors, awards, etc.
- Perform sound, video and lighting checks
- Set up registration table at LEAST 30 minutes before event start time

### MINI EVENT BOX

- |                     |                      |                  |
|---------------------|----------------------|------------------|
| ◆ AA Batteries      | ◆ Glue Stick         | ◆ Rubber Bands   |
| ◆ Band-aids         | ◆ Highlighter        | ◆ Scissors       |
| ◆ Black Sharpies    | ◆ Message Pad        | ◆ Staple Remover |
| ◆ Blank Index Cards | ◆ Note Pad           | ◆ Stapler        |
| ◆ Blue Sharpie      | ◆ Paper Clips/Clamps | ◆ Tape Dispenser |
| ◆ Double-Sided Tape | ◆ Pencils and Pens   | ◆ Tylenol        |
| ◆ Extra Name tags   | ◆ Post-It Notes      |                  |

### FOLLOWING THE EVENT

- Collect all needed invoices and process for payment
- Send thank you notes to participants, volunteers and staffers
- Hold event review to examine successes and points for improvement
- Conduct survey of attendees to gauge success.
- Make list of notations for next event
- Pull tear sheets and media clips for your file
- Complete file with documents of record

**!** *Please note: There should be a documented follow-up worksheet so that those in the chapter leadership positions in the future will be able to replicate successful aspects and not repeat those that were unsuccessful.*

### EVENT EVALUATION

After your successful event, here are some follow-up questions that may help next years' event to be even better...

#### PREPARATION

- Was the planning and organizing of our event completed on schedule?
- Were there an adequate number of members involved in the planning, organizing, preparation and follow-up of the event?
- How did guests learn of the event?

#### EVENT

- Did the event start on time?
- Did the event flow smoothly?
- Was the length of the event appropriate?
- How many attendees were there?
- Was there enough food, entertainment, etc.?
- Was the location suitable for the event?

#### FOLLOW-UP

- What comments/suggestions were made at the event?
- What could have been done to make it a more successful event?
- Have "Thank You" cards been sent to the appropriate people?
- How else can we recognize those who made the event a success?
- Did we contact the Alumni Association about the event's success?
- Have the pictures of the event been developed/ downloaded?