Anschutz

Recommended Event Planning Checklist

Complex Events

This checklist is inclusive of tasks large and small so planners can consider the components of their event and if the following steps are applicable. This is not meant to be all-encompassing, but rather a conversation starter for planners. In event planning, more time is better than less, but we understand events and meetings pop up at the last minute from time to time.

Contact events@cuanschutz.edu if you need consultation on your event or visit our Plan an Event website for additional resources.

FOUR – SIX MONTHS TO 1 YEAR AHEAD

- ❑ Determine the purpose, format, target audience, and estimate of attendance for event.
- ❑ Select a name or theme.
- ❑ Review event policies and procedures to ensure event compliance with policy.
  - ➢ **Frequently referenced policies:**
    - Facilities Use by External Agencies
    - Events with alcohol
- ❑ Review the University Risk Management Event & Activity Planning site for best practices and requirements for waivers, events with alcohol, and events including minors.
- ❑ Create rough event outline and agenda to define event logistics and room requirements.
  - ➢ **Consider:** Will it be hybrid, in-person, time of day, if meals are included
- ❑ Create an estimated budget and get approval to spend identified funds.
  - ➢ Determine the process for payments to vendors (Pcard, PO, etc.) based on your department requirements
- ❑ Complete Official Function Form and review CU PSC procedures on event purchases.
- ❑ Select the date and backup date, but before confirming, clear the date with University Calendar.
  - ➢ **Planning tip:** Double-check for conflicts with other major functions (Commencement, Block Party, Transforming Healthcare Lecture, signature department events, etc.).
- ❑ Create an EMS account, if you don't have one already. Accounts are automatically created for CU Anschutz staff, faculty, and enrolled students. Affiliates must request accounts.
- ❑ Select and reserve a facility using EMS.
  - ➢ **Consider:**
    - Space for main session, breakouts, green room, exhibitors, meals, office, registration, catering back of house, etc.
    - Maximum capacity the room allows is based on furniture arrangement. Review the large venue capacity guide.
    - Ensure you book the **full time** you need the space, including setup/teardown, catering setup, AV run-throughs.
    - Event Service charges will apply to internal, affiliate, and external events that are held in large venues on campus after hours and on weekends.
- ❑ Develop a rain plan if the event is to be held outdoors.
- ❑ Add event to University Calendar once reservations are confirmed.
- ❑ Plan promotion and publicity of event to internal and external audiences.

- **Planning Tip:** Review the Mass Electronic Communications Policy to ensure compliance with internal communications. Strategic electronic communications recommendations are available.

- ❑ Confirm program speaker availability.
- ❑ Begin honorarium process, if applicable.
- ❑ Coordinate speaker travel (flight, hotel, ground transportation, per diem), if applicable.
- ❑ Reserve a block of hotel rooms, if necessary.
- ❑ Gather planning committee and determine roles and meeting cadence.
- ❑ Draw up preliminary guest list categories. Begin collecting addresses for save-the-date mailing, if needed.
- ❑ Solicit bids from and select a caterer.
  - **Planning Tip:**
    - On campus catering is available through our restaurant partners.
    - TStreet Kitchen has first right of offer for activities in the Anschutz Health Sciences Building.
- ❑ Reserve rental equipment such as transportation, tables, linens, chairs, tents, podiums, etc.
  - **Planning tip:**
    - Some equipment is available for rent from the Campus via EMS.
    - All contracts must be signed by PSC. Employees cannot sign or agree to any contract with terms & conditions.
- ❑ Select and order recognition items (award, honor, citation).
- ❑ Plan presentations (timing, remarks, PowerPoints).
- ❑ Ensure a universally designed event experience by considering accessibility of your venue, registration process, marketing, signage, communications, presentations, transportation, menu, etc. Contact the Office of Disability, Access, & Inclusion if you need guidance on best practices and requirements.
- ❑ Create registration platform.
  - **Planning tip:**
    - **Collecting funds**- Cvent must be used if the University will be collecting funds.
    - **Free events** can be conducted through Register via the University Calendar or through another university platform (Formstack, Microsoft Forms, Qualtrics).
    - **External entity events**- the external entity can collect registration fees and pay the university the required fees for campus services.

THREE – FOUR MONTHS AHEAD

- ❑ Write copy, design, and get approval of printed invitations and all other printed materials.
- ❑ Finalize and get approval of the guest list.
- ❑ Contact CU Anschutz Design & Print Services to coordinate the printed materials mailing (if large quantity mailing).
- ❑ Send save-the-date announcements to guests (3-5 months prior to the event), if applicable.
- ❑ Contact program speakers.
  - ➢ Supply suggestions for their remarks.
  - ➢ Gather their biographical information.
  - ➢ Request a photo of each participant for publicity and programs.
- ❑ Submit EMS request for Parking to notify of parking impacts, if needed.
  - ➢ **Planning tip:**
    - Request 1 parking code if event will cover parking for attendees.
    - If attendees are self-pay, Parking Office needs to be notified if more than 50 attendees are expected.
- ❑ Decide on music for the event. Book entertainers and talent.
- ❑ Plan the decorations and color scheme.
- ❑ Order prizes, awards, giveaways, printed folders, novelties, or other special needs.
- ❑ Contact and/or meet with the florist.
- ❑ Submit EMS request for University Police Department to update security on your plans.
  - ➢ **Planning tip***:*
    - Events involving the service of alcohol may require the presence of an officer. University PD will determine if a police officer or Campus Safety Officer.
    - Officer staffing may be required for events with political or media presence.
- ❑ Notify University Events if your event will include 250 or more external attendees or if dignitaries, political officials/candidates, or media will be invited. These events must be submitted for review by the High Impact Events Committee.
- ❑ Begin emergency plans for your event. Consider how you will communicate with attendees in emergencies, emergency exits, supplies, and severe weather readiness/contingencies. Contact Emergency Management for consultation on Event Action Planning: EmergencyMgmt@cuanschutz.edu.
- ❑ Begin publicity of event.
- ❑ Submit EMS request for Permission to Film/Photograph on Campus if you will be having third party videography or photography as part of your event. This ensures proper insurance and licensing.
- ❑ Begin creating a logistical outline to document all arrangements as they are decided on and confirmed.
- ❑ Certificates of Insurance received from all contracted external vendors. Keep on file.

TWO MONTHS AHEAD

- ❑ Select menus and confirm contract with catering vendor.
- ❑ Send out invitations 4 – 6 weeks prior to event (depending on event).
- ❑ Finalize decor arrangements.
- ❑ Make hotel and transportation arrangements for out-of-town dignitaries and guests. Send an itinerary to each.
- ❑ Prepare, write, and print the program.
- ❑ Submit EMS request for audio visual support based on room setup, final presentation format, hybrid event setup, number of microphones, etc.
  - ➢ **Planning tip:**
    - Consultations for events with audio visual needs are highly recommended. Schedule a short consultation by emailing AVEvents@cuanschutz.edu.
- ❑ Confirm if your event will be livestreamed and if you can use the cameras in the room or if you need cameras rented.
- ❑ Submit EMS request for Zoom webinar setup (required if you want one way livestream connection in a classroom or meeting room).
- ❑ Submit EMS request for badge access to room, building, loading dock, etc.
  - ➢ **Planning tip:**
    - Consider how your caterer and vendors will load into the facility.
    - External doors to many campus facilities remain locked 24/7. External doors can be unlocked only if a Campus Safety Officer is hired to staff the door or staff with a badge can provide access to vendors and attendees.
    - Even if you have requested badge access previously, always include access request on your reservation to ensure your access remains current.
- ❑ Schedule site tour of the facility if needed.
- ❑ Recruit volunteers to staff registration, help with wayfinding, setup, teardown.
- ❑ Submit Alcohol Authorization Form, if needed.
  - ➢ **Planning tip:**
    - The minimum lead time for committee review of the Alcohol Authorization form is 30 days.
    - This form is required if any portion of the event is being paid for by university funds, even if it is being held at a licensed venue.
- ❑ If you are planning an event on the CU Anschutz Medical Campus that requires the full or partial closure of a roadway or sidewalk (Food Truck, 5K, etc.) you must submit a road closure request which will be reviewed and approved by the Campus Traffic Committee.

TWO – FOUR WEEKS AHEAD

- ❑ Record and acknowledge RSVPs as they are received.
- ❑ Mail out confirmations, tickets, parking permits, to attendees if necessary.
- ❑ Create a diagram of the room/building to be used as a seating chart or for setup. Attach in your EMS request or send to eventsetup@cuanschutz.edu.
- ❑ Submit EMS request for final Facilities setup/rentals based on room setup, final presentation format, etc.
  - ➢ **Planning tip:**
    - Consultations for large or multi-room events with setup needs are highly recommended. Schedule a short consultation by emailing eventsetup@cuanschutz.edu.
    - If you have an outdoor event and need power, confirm the outlets will be unlocked for your event.
- ❑ Submit EMS request for final housekeeping based on schedule, room timing, event format.
  - ➢ **Planning tip:**
    - Consider requesting additional trash cans for large events and receptions.
    - Always schedule post-event cleaning when you have an event with food (indoors or outdoors).
    - Additional restroom servicing can be requested if you are using a meeting room all day, have a large number of attendees, or if you have a high-profile event.
- ❑ Run registration reports for deans and leadership and start to prepare any briefing documents.
- ❑ Send detailed instructions to all staff and participants (including tickets, parking permits, and maps).
- ❑ Finalize details with caterer, rental company, and all vendors.
- ❑ Write speeches and introductions, if necessary.
- ❑ Finalize the audiovisual presentations.

ONE WEEK AHEAD

- ❑ Create an event management “day of” schedule outlining all deliveries and timing for the event.
- ❑ Print out the guest list in alphabetical order.
- ❑ Create the seating chart, if needed.
- ❑ Finish place cards, table cards, and/or name tags.
- ❑ Create directional signage.
- ❑ Brief all staff, greeters, ambassadors, and volunteers on their duties (email or meeting).
- ❑ Gather all presentation items such as gifts, plaques, trophies. Collect ceremonial items.
- ❑ Make any final changes in EMS no less than 4 calendar days ahead of your event. If you have final changes to your setup within 4 days of your event, email eventsetup@cuanschutz.edu.
- ❑ Conduct a dry run/rehearsal with the A/V team to test PowerPoints, microphone setups, music, etc. It can be done the day before the event if you have the room reserved. Email AVEvents@cuanschutz.edu to schedule.
- ❑ Finalize the briefing packet and send along with the guest list to VIPs and deans (with full names, titles, affiliations, and other specific interests), biographies, and the final schedule of events to administrative leadership or host.
- ❑ Finalize complete script and send prepared introductions, citations, and speeches to those who will read them.
- ❑ Contact catering with RSVPs and guarantees.
- ❑ Pre-create your Free Food Alert Giveaway to be prepared to announce available surplus food to the campus community to pick up after the event.
- ❑ Prepare event box with any supplies, such as tape, string, zip ties, staplers, clip boards, baskets, etc. you may need.
- ❑ Send final “know before you go” communications to event attendees regarding event timing, directions, parking and code, and answers to frequently asked questions.

EVENT DAY

- ❑ Arrive early.
- ❑ Bring the logistical outline, production schedule, directions, phone numbers, food orders, seating charts, name tags, table assignments, guest lists, and the event supply box.
- ❑ Check all facilities and setups.
- ❑ Set up directional signage.
- ❑ Provide instructions to volunteers.
- ❑ Set up event venue with tables, signs, awards, etc.
- ❑ Conduct sound and computer checks.
- ❑ Set up registration. Be sure it is ready no later than 30 minutes prior to the start of your event.
- ❑ Follow event timeline, have fun, clean up!
- ❑ Post your Free Food Alert Giveaway, if food is available near the conclusion of your event. **Do not leave food unattended or behind**. Clean up all remaining food after your giveaway period concludes.

AFTER THE EVENT

- ❑ Send thank you notes to staff, volunteers, and vendors.
- ❑ Publish event video or resources on website.
- ❑ Finalize billing, pay invoices, and prepare final budget, if necessary.
- ❑ Conduct event meeting to discuss success or ways to improve in the future.
- ❑ Survey attendees, if appropriate.
- ❑ If the event is an annual event, submit room requests for the following year when schedule is released.