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 will be 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 series, signature department events, etc.)
- Create an EMS account, if you don’t have one already
- Select and reserve a facility using EMS
  - Consider:
    - Space for main session, breakouts, green room, exhibitors, meals, office, registration, catering back of house, etc.
    - Ensure you book the time you need the space, including setup/teardown times or days. Event Services fees will apply to internal 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
- 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
- Consider **Mass Electronic Communications Policy** to ensure compliance with internal communications. **Strategic electronic communications** recommendations are available.

<table>
<thead>
<tr>
<th>Task</th>
<th>Planning tip</th>
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<tbody>
<tr>
<td>Solicit bids from and select a caterer</td>
<td>- On campus catering is available through <strong>Health Hospitality Partners</strong>.</td>
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<td></td>
<td>- T-Street is the <strong>exclusive caterer</strong> of the Anschutz Health Sciences Building.</td>
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<td>Reserve rental equipment such as transportation, tables, linens, chairs,</td>
<td>- Some equipment is available for rent from the Campus via <strong>EMS</strong>.</td>
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<td>tents, podiums, etc.</td>
<td>All contracts must be signed by PSC. Employees cannot sign or agree to any contract with terms &amp; conditions.</td>
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<td>Select and order recognition items (award, honor, citation)</td>
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<tr>
<td>Order favors, souvenirs, printed folders, and other give-away items</td>
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<td>Plan presentations (timing, remarks, PowerPoints)</td>
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<tr>
<td>Ensure a universally designed and inclusive event experience by considering</td>
<td>Planning tip:</td>
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<tr>
<td>accessibility of your venue, registration process, marketing, signage,</td>
<td>- <strong>Collecting funds</strong> - <strong>Cvent</strong> must be used if the University will be collecting funds.</td>
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<tr>
<td>communications, presentations, transportation, menu, etc. Contact the</td>
<td>- <strong>Free events</strong> can be conducted through Register via the <strong>University Calendar</strong> or through another platform.</td>
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<tr>
<td>Office of Disability, Access, &amp; Inclusion if you need guidance on best</td>
<td>- <strong>External agency events</strong> - the external agency can collect registration fees and pay the university the required fees for campus services.</td>
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<td>practices and requirements.</td>
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### 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, book entertainers and talent
- Plan the decorations and color scheme
- Order prizes, awards, giveaways, novelties, foods, or other special needs
- Contact and/or meet with the florist
  - **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.
- Submit [EMS](#) request for University Police Department to update security on your plans.
- 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 publicity of event
- Submit [EMS](#) request for Permission to Film/Photograph on Campus if you will be having 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.
- Certificate of Insurance Received from all contracted external vendors. Keep on file.
### TWO MONTHS AHEAD

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<td>Select menus and confirm contract with catering vendor</td>
<td>- Consultations for events with audio visual needs are highly recommended. Schedule a short consultation by emailing <a href="mailto:OIT-ServiceDesk@cuanschutz.edu">OIT-ServiceDesk@cuanschutz.edu</a>.</td>
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<td>Send out invitations 4 – 6 weeks prior to event (depending on event)</td>
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<td>Finalize decor arrangements</td>
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<td>Make hotel and transportation arrangements for out-of-town dignitaries and guests.</td>
<td>Send an itinerary to each.</td>
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<td>Prepare, write, and print the program</td>
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<td>Finalize the audiovisual presentations</td>
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<tr>
<td>Submit <a href="#">EMS</a> request for audio visual support based on room setup, final presentation format, hybrid event setup, number of microphones, etc.</td>
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<td>Contact <a href="#">CU Productions</a> if you need production cameras, multiple cameras, or if you are livestreaming an outdoor event.</td>
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<td>Submit <a href="#">EMS</a> request for badge access to room, building, loading dock, etc.</td>
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<td>Confirm if your event will be livestreamed and if you can use the cameras in the room or if you need cameras rented.</td>
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<td>Schedule site tour of the facility if needed</td>
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<td>Recruit volunteers to staff registration, help with wayfinding, setup, teardown</td>
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<td>If you are planning an event on the CU Anschutz Medical Campus that requires the full or partial closure of a roadway or sidewalk (5K, etc.) you must submit a request which will be reviewed and approved by the Campus Traffic Committee.</td>
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**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 set up. 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.
  - Additional restroom servicing can be requested if you are using a meeting room all day and 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.
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 48 hours ahead of your event. If you have final changes to your setup within 48 hours of your event, email eventsetup@cuanschutz.edu.
- Conduct a dry run/rehearsal with the A/V team to test PowerPoints, microphone setups, music, etc. Can be done the day before the event if you have the room reserved. Email OIT-ServiceDesk@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
- 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!

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.