

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

<input type="checkbox"/> Determine the purpose, format, target audience, and estimate of attendance for event	
<input type="checkbox"/> Select a name or theme	
<input type="checkbox"/> Review event policies and procedures to ensure event compliance with policy	Frequently referenced policies: <ul style="list-style-type: none"> - Facilities Use by External Agencies - Events with alcohol
<input type="checkbox"/> Review the University Risk Management Event & Activity Planning site for best practices and requirements for waivers, events with alcohol, and events including minors.	
<input type="checkbox"/> Create rough event outline and agenda to define event logistics and room requirements	Consider: <ul style="list-style-type: none"> - Will it be hybrid, in-person, time of day, if meals will be included
<input type="checkbox"/> 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
<input type="checkbox"/> Complete Official Function Form and review CU PSC procedures on event purchases	
<input type="checkbox"/> Select the date and backup date, but before confirming, clear the date with University Calendar	Planning tip: <ul style="list-style-type: none"> - Double-check for conflicts with other major functions (Commencement, Block Party, Transforming Healthcare lecture series, signature department events, etc.)
<input type="checkbox"/> Create an EMS account , if you don't have one already	
<input type="checkbox"/> Select and reserve a facility using EMS	Consider: <ul style="list-style-type: none"> - 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.
<input type="checkbox"/> Develop a rain plan if the event is to be held outdoors	
<input type="checkbox"/> Add event to University Calendar once reservations are confirmed	

<input type="checkbox"/> Plan promotion and publicity of event to internal and external audiences	
<input type="checkbox"/> Confirm program speaker availability	
<input type="checkbox"/> Begin honorarium process, if applicable	
<input type="checkbox"/> Coordinate speaker travel (flight, hotel, ground transportation, per diem), if applicable	
<input type="checkbox"/> Reserve a block of hotel rooms, if necessary	
<input type="checkbox"/> Gather planning committee and determine roles and meeting cadence	
<input type="checkbox"/> Draw up preliminary guest list categories. Begin collecting addresses for save-the-date mailing, if needed	
<input type="checkbox"/> Consider Mass Electronic Communications Policy to ensure compliance with internal communications. Strategic electronic communications recommendations are available.	
<input type="checkbox"/> Solicit bids from and select a caterer	<p>Planning tip:</p> <ul style="list-style-type: none"> - On campus catering is available through Health Hospitality Partners. - T-Street is the exclusive caterer of the Anschutz Health Sciences Building.
<input type="checkbox"/> Reserve rental equipment such as transportation, tables, linens, chairs, tents, podiums, etc.	<p>Planning tip:</p> <ul style="list-style-type: none"> - Some equipment is available for rent from the Campus via EMS. <p>All contracts must be signed by PSC. Employees cannot sign or agree to any contract with terms & conditions.</p>
<input type="checkbox"/> Select and order recognition items (award, honor, citation)	
<input type="checkbox"/> Order favors, souvenirs, printed folders, and other give-away items	
<input type="checkbox"/> Plan presentations (timing, remarks, PowerPoints)	
<input type="checkbox"/> Ensure a universally designed and inclusive 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.	
<input type="checkbox"/> Create registration platform	<p>Planning tip:</p> <ul style="list-style-type: none"> - 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 platform. - External agency events- the external agency can collect registration fees and pay the university the required fees for campus services.

THREE – FOUR MONTHS AHEAD

<input type="checkbox"/> Write copy, design, and get approval of printed invitations and all other printed materials	
<input type="checkbox"/> Finalize and get approval of the guest list	
<input type="checkbox"/> Contact CU Anschutz Design & Print Services to coordinate the printed materials mailing (if large quantity mailing)	
<input type="checkbox"/> Send save-the-date announcements to guests (3-5 months prior to the event), if applicable	
<input type="checkbox"/> Contact program speakers	<input type="checkbox"/> Supply suggestions for their remarks. <input type="checkbox"/> Gather their biographical information. <input type="checkbox"/> Request a photo of each participant for publicity and programs.
<input type="checkbox"/> Submit EMS request for Parking to notify of parking impacts, if needed	Planning tip: <ul style="list-style-type: none"> - 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.
<input type="checkbox"/> Decide on music, book entertainers and talent	
<input type="checkbox"/> Plan the decorations and color scheme	
<input type="checkbox"/> Order prizes, awards, giveaways, novelties, foods, or other special needs	
<input type="checkbox"/> Contact and/or meet with the florist	
<input type="checkbox"/> Submit EMS request for University Police Department to update security on your plans.	Planning tip: <ul style="list-style-type: none"> - 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.
<input type="checkbox"/> 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.	
<input type="checkbox"/> Begin publicity of event	
<input type="checkbox"/> 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.	
<input type="checkbox"/> Begin creating a logistical outline to document all arrangements as they are decided on and confirmed.	
<input type="checkbox"/> Certificate of Insurance Received from all contracted external vendors. Keep on file.	

TWO MONTHS AHEAD

<input type="checkbox"/> Select menus and confirm contract with catering vendor	
<input type="checkbox"/> Send out invitations 4 – 6 weeks prior to event (depending on event)	
<input type="checkbox"/> Finalize decor arrangements	
<input type="checkbox"/> Make hotel and transportation arrangements for out-of-town dignitaries and guests. Send an itinerary to each.	
<input type="checkbox"/> Prepare, write, and print the program	
<input type="checkbox"/> Finalize the audiovisual presentations	
<input type="checkbox"/> Submit EMS request for audio visual support based on room setup, final presentation format, hybrid event setup, number of microphones, etc.	<p>Planning tip:</p> <ul style="list-style-type: none"> - Consultations for events with audio visual needs are highly recommended. Schedule a short consultation by emailing OIT-ServiceDesk@cuanschutz.edu.
<input type="checkbox"/> Confirm if your event will be livestreamed and if you can use the cameras in the room or if you need cameras rented.	
<input type="checkbox"/> Submit EMS request for Zoom webinar setup (required if you want one way livestream connection in a classroom or meeting room)	
<input type="checkbox"/> Contact CU Productions if you need production cameras, multiple cameras, or if you are livestreaming an outdoor event.	
<input type="checkbox"/> Submit EMS request for badge access to room, building, loading dock, etc.	<p>Planning tip:</p> <ul style="list-style-type: none"> - 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 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.
<input type="checkbox"/> Schedule site tour of the facility if needed	
<input type="checkbox"/> Recruit volunteers to staff registration, help with wayfinding, setup, teardown	
<input type="checkbox"/> Submit Alcohol Authorization Form , if needed	<p>Planning tip:</p> <ul style="list-style-type: none"> - The minimum lead time for review of the Alcohol Authorization form is 30 days. - This form is required if <u>any</u> portion of the event is being paid for by university funds, even if it is being held at a licensed venue.
<input type="checkbox"/> 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.	

TWO – FOUR WEEKS AHEAD

<ul style="list-style-type: none"> ❑ Record and acknowledge RSVPs as they are received 	
<ul style="list-style-type: none"> ❑ Mail out confirmations, tickets, parking permits, to attendees if necessary 	
<ul style="list-style-type: none"> ❑ 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@cuanschultz.edu. 	
<ul style="list-style-type: none"> ❑ Submit EMS request for final Facilities setup/rentals based on room setup, final presentation format, etc. 	<p>Planning tip:</p> <ul style="list-style-type: none"> - Consultations for large or multi-room events with setup needs are highly recommended. Schedule a short consultation by emailing eventsetup@cuanschultz.edu. - If you have an outdoor event and need power, confirm the outlets will be unlocked for your event.
<ul style="list-style-type: none"> ❑ Submit EMS request for final housekeeping based on schedule, room timing, event format. 	<p>Planning tip:</p> <ul style="list-style-type: none"> - 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.
<ul style="list-style-type: none"> ❑ Run registration reports for deans and leadership and start to prepare any briefing documents 	
<ul style="list-style-type: none"> ❑ Send detailed instructions to all staff and participants (including tickets, parking permits, and maps) 	
<ul style="list-style-type: none"> ❑ Finalize details with caterer, rental company, and all vendors 	
<ul style="list-style-type: none"> ❑ Write speeches and introductions, if necessary. 	

ONE WEEK AHEAD

<input type="checkbox"/> Create an event management “day of” schedule outlining all deliveries and timing for the event
<input type="checkbox"/> Print out the guest list in alphabetical order
<input type="checkbox"/> Create the seating chart, if needed.
<input type="checkbox"/> Finish place cards, table cards, and/or name tags
<input type="checkbox"/> Create directional signage
<input type="checkbox"/> Brief all staff, greeters, ambassadors, and volunteers on their duties (email or meeting)
<input type="checkbox"/> Gather all presentation items such as gifts, plaques, trophies. Collect ceremonial items.
<input type="checkbox"/> 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@cuanschultz.edu .
<input type="checkbox"/> 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@cuanschultz.edu to schedule.
<input type="checkbox"/> 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
<input type="checkbox"/> Finalize complete script and send prepared introductions, citations, and speeches to those who will read them
<input type="checkbox"/> Contact catering with RSVPs and guarantees
<input type="checkbox"/> Prepare event box with any supplies, such as tape, string, zip ties, staplers, clip boards, baskets, etc. you may need
<input type="checkbox"/> 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

<input type="checkbox"/> Arrive early
<input type="checkbox"/> Bring the logistical outline, production schedule, directions, phone numbers, food orders, seating charts, name tags, table assignments, guest lists, and the event supply box
<input type="checkbox"/> Check all facilities and setups
<input type="checkbox"/> Set up directional signage
<input type="checkbox"/> Provide instructions to volunteers
<input type="checkbox"/> Set up event venue with tables, signs, awards, etc.
<input type="checkbox"/> Conduct sound and computer checks.
<input type="checkbox"/> Set up registration. Be sure it is ready no later than 30 minutes prior to the start of your event.
<input type="checkbox"/> Follow event timeline, have fun, clean up!

AFTER THE EVENT

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

