Recommended Event Planning Checklist
Meeting

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

1 MONTH AHEAD

☐ Determine the purpose, format, audience, and estimate of attendance for meeting	
☐ Review event policies and procedures to ensure 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 activities with alcohol.	
☐ Submit Alcohol Authorization Form, if needed	**Planning tip:** - **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 meeting is being paid for by university funds, even if it is being held at a licensed venue.
☐ Create rough outline and agenda to define 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 purchases	
☐ Create an EMS account, if you don't have one already	
☐ Select and reserve a facility using EMS	**Consider:** - Number of attendees, duration of meeting, technology requirements, 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 meetings that are held in large venues on campus after hours and on weekends.

❑ Solicit bids from and select a caterer. Select menus and confirm contract with catering vendor	**Planning tip:** - On campus catering is available through Health Hospitality Partners. - T-Street is the **exclusive caterer** of the Anschutz Health Sciences Building.
❑ Plan presentations (timing, remarks, PowerPoints)	
❑ Ensure a universally designed and inclusive meeting experience by considering accessibility of your venue, parking, signage, communications, presentations, menu, etc. Contact the Office of Disability, Access, & Inclusion if you need guidance on best practices and requirements.	

THREE WEEKS AHEAD

❑ Submit EMS request for Parking to notify of parking impacts, if needed	**Planning tip:** - Request 1 parking code if the meeting will cover parking for attendees. - If attendees are self-pay, Parking Office needs to be notified if more than 50 attendees are expected.
❑ Submit EMS request for University Police Department to update security on your plans.	**Planning tip:** - Activities 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 meetings with political or media presence.
❑ Notify University Events if your meeting will include dignitaries, political officials/candidates, or media. These activities must be submitted for review by the High Impact Events Committee.	
❑ Submit EMS request for Permission to Film/Photograph on Campus if you will be having videography or photography as part of your meeting. 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 (including caterers). Keep on file.	

TWO WEEKS AHEAD

❑ Submit EMS request for audio visual support based on room setup, final presentation format, hybrid meeting setup, number of microphones, etc.	**Planning tip:** - Consultations for meetings with audio visual needs are highly recommended. Schedule a short consultation by emailing OIT-ServiceDesk@cuanschutz.edu.
❑ Confirm if your meeting 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 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.
❑ If setup is needed, 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.	
❑ Submit EMS request for final housekeeping based on schedule, room timing, format.	**Planning tip:** - Always schedule post-event cleaning when you have an activity 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 activity.
❑ Finalize details with caterer and all vendors	

ONE WEEK AHEAD

❑ Create a meeting "day of" schedule outlining all deliveries and timing
❑ Create directional signage
❑ Make any final changes in EMS no less than 48 hours ahead of your activity. If you have final changes to your setup within 48 hours of your activity, email eventsetup@cuanschutz.edu.
❑ Depending on the complexity of your meeting, conduct a dry run/rehearsal with the A/V team to test PowerPoints, microphone setups, music, etc. Can be done the day before the activity if you have the room reserved. Email OIT-ServiceDesk@cuanschutz.edu to schedule.
❑ Send final "know before you go" communications to attendees regarding 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,
❑ Check all facilities and setups
❑ Set up directional signage
❑ Conduct sound and computer checks.

AFTER THE EVENT

❑ Send thank you notes to staff, volunteers, and vendors
❑ Distribute meeting recording, if needed
❑ Finalize billing, pay invoices, and prepare final budget, if necessary.