

Recommended Event Planning Checklist

Meeting

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.

1 MONTH AHEAD

- ❑ Determine the purpose, format, target audience, and estimate of attendance for event.
- ❑ 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.
- ❑ 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.
- ❑ 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.
- ❑ [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, affiliate, and external events 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 our [restaurant partners](#).
 - TStreet Kitchen has first right of offer for activities in the Anschutz Health Sciences Building.
- ❑ 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.

THREE WEEKS AHEAD

- ❑ 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.
- ❑ 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.
- ❑ 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 WEEKS AHEAD

- ❑ 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@cuanschultz.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 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.
- ❑ If setup is needed, 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@cuanschultz.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, 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.
- ❑ Finalize details with caterer, rental company, and all vendors.

ONE WEEK AHEAD

- ❑ Create an event management “day of” schedule outlining all deliveries and timing for the event.
- ❑ Create directional signage.
- ❑ Depending on the complexity of your meeting, 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@cuanschultz.edu to schedule.
- ❑ 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.
- ❑ Conduct sound and computer checks.
- ❑ Dispose of any leftover coffee or food items. Do not leave these items behind on the tables in the room. Instead, place them in the trash.

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.