

Jefferson College

Event-Planning Checklist

This Event-Planning Checklist was developed to assist staff and faculty when they are organizing an event on campus. Not all items on the Checklist will be relevant to every function. Questions pertaining to the checklist or requests for assistance should be directed to the Administrative Assistant in the Office of the Vice President of Finance and Administration at ext. 3121.

Pre-Plan (Check all that apply.)

Goal/Purpose of the Event	
<input type="checkbox"/> Education	<input type="checkbox"/> Wellness
<input type="checkbox"/> Committee/Team Information Sharing	<input type="checkbox"/> Sporting
<input type="checkbox"/> Entertainment	<input type="checkbox"/> Fundraiser
<input type="checkbox"/> Social	

Type of Event	
<input type="checkbox"/> Conference	<input type="checkbox"/> Panel Discussion
<input type="checkbox"/> Lecture	<input type="checkbox"/> Workshop
<input type="checkbox"/> Meeting	<input type="checkbox"/> Other _____

Legalities	
<input type="checkbox"/> Event Approval	<input type="checkbox"/> Insurance
<input type="checkbox"/> Contracts	<input type="checkbox"/> Waivers

Target Audience	
<input type="checkbox"/> All Campus	<input type="checkbox"/> Community/Public
<input type="checkbox"/> Faculty/Staff	<input type="checkbox"/> Number of participants expected _____
<input type="checkbox"/> Student	

Disability Access and Accommodations for Speakers, Special Guests, and Participants (Must contact Disability Support Services Office at ext. 3169 to arrange these services.)	
<input type="checkbox"/> Special-needs section (interpreter, other _____)	
<input type="checkbox"/> Access accommodations notice on flyers and posters, when appropriate stated as... <i>“For disability accommodations, please call Disability Support Services Office at 636-481-3169.”</i>	
<input type="checkbox"/> Accessible location	<input type="checkbox"/> Special seating section
<input type="checkbox"/> Special transportation	<input type="checkbox"/> Sign language
<input type="checkbox"/> Lowered podium	interpreter/communication assistance
<input type="checkbox"/> Wheelchair access to stage	<input type="checkbox"/> Alternatives to print materials

Location of Event	
<input type="checkbox"/> On-Campus	
<input type="radio"/> Hillsboro (Space _____)	
<input type="radio"/> Arnold (Space _____)	
<input type="radio"/> Imperial (Space _____)	
<input type="checkbox"/> Off-Campus (Location _____)	

Space Reservations

- Determine your physical space set-up (theatre-style, round tables, banquet tables, etc.)
 - Table
 - Linens (including skirting) for table
 - Chairs
 - Stage
 - Microphones
 - Audio/Video needs
 - Bulletin boards/chalk boards/easels/large writing pads (*determine whether required and take into consideration when reserving space*)
 - Physical layout
 - Reserved seating
 - Host/Emcee
 - Schedule of event/timeline
 - Podium
 - Easels
 - Photographer
- Set-up/Tear-down time
- Inclement weather plans
- See Virtual EMS or contact the Administrative Assistant to the Vice President of Finance and Administration at ext. 3121 to request space.

Contact Person (usually chair of organizing committee)

- Name _____
- Address _____
- Telephone number/Fax number _____
- E-mail _____

Committee

- Members (include telephone numbers and e-mail addresses)
- Meeting schedule
- Distribution of responsibilities

Budget

- Source of funds
- Accounts required (for example: entertainment, accommodations, color printing, disability accommodations, etc.)

Date/Time

- Check college Master Calendar and Virtual EMS for appropriate date
- Check calendar of anyone who is requested to attend, particularly deans, chairs or directors, etc.
- Select the date _____
- Select the time _____

3 – 6 Months Prior to the Event (Check all that apply.)

Speakers	
<input type="checkbox"/> Invitation	<input type="checkbox"/> Accommodations
<input type="checkbox"/> Map with directions	<input type="checkbox"/> Thank you
<input type="checkbox"/> Background information (Publicity photograph; title of lecture, detailed script)	
<input type="checkbox"/> Speaker's/panelists' agent contact information, if any, including telephone numbers	
<input type="checkbox"/> Parking/parking passes (<i>contact Campus Police for VIP passes</i>)	

Guests	
<input type="checkbox"/> Guest list	
<input type="checkbox"/> Develop a promotional plan, including print and/or electronic materials (posters, flyers, invitations, tickets, programs, etc.).	
<input type="checkbox"/> Save the Date postcards/e-mail/invitations designed	
<input type="checkbox"/> Map with directions: on invitation or enclose (<i>campus maps can be obtained from College Relations or on-line at www.jeffco.edu by clicking on "Community Outreach" and going to the "Jefferson College Information" section.</i>)	
<input type="checkbox"/> Disability access and accommodation requirements (wheelchair access, special seating section, sign language interpreter, or communication assistance). Contact Disability Support Services Office at ext. 3169 for assistance.	
<input type="checkbox"/> Parking/parking passes (Contact Campus Police for VIP passes.)	
<input type="checkbox"/> Follow-up, if necessary, after event	

8 Weeks Prior to the Event (Check all that apply.)

Publicity	
<input type="checkbox"/> JCTV community calendar – JCTV	
<input type="checkbox"/> Master Calendar	
<input type="checkbox"/> Meet & Plan Print & Digital pieces with Graphic <ul style="list-style-type: none"> <input type="checkbox"/> Visual & printed material created (<i>contact Senior Graphic Designer, ext. 3374</i>) <ul style="list-style-type: none"> <input type="checkbox"/> Design concept & logos created <input type="checkbox"/> Save the date postcards, invitations, envelopes, and corresponding mail pieces <ul style="list-style-type: none"> <input type="checkbox"/> Mail save the date postcards – COS 	
<input type="checkbox"/> Meet with PR & Marketing <ul style="list-style-type: none"> <input type="checkbox"/> News Release (<i>contact Director of Public Relations & Marketing, ext. 3106: feasibility at least one month in advance of event</i>) 	

Budget	
<input type="checkbox"/> Secure Funding	<input type="checkbox"/> Process Orders for Payment (speaker's fees, etc.)

Miscellaneous	
<input type="checkbox"/> Contracts signed	<input type="checkbox"/> Response deadline date
<input type="checkbox"/> Guest list	<input type="checkbox"/> Contact person & information
<input type="checkbox"/> Special-guest seating	<input type="checkbox"/> Internal distribution, if appropriate
<input type="checkbox"/> Signage	<input type="checkbox"/> Extra invitations for archive files

Additional Staff Assistance

- Campus Police
- Student Ushers/Greeters (*For student volunteers, contact Student Leadership Specialist at ext. 3231.*)

Catering

- Contracted College vendor: Contact the Food Services Director, ext. 3255 or vikingcafe@jeffco.edu
- If you are interested in using an external food source or DIY, you must receive “first right of refusal” permission from the Food Services Director. *Please reference Resource A: Catering/Food Service Option Guidelines for JC Events Catering Budget
- Menu-planning (mindful of dietary restrictions)
 - Number of chairs at head table
 - Linens
- Number of tables and chairs for dining

4-6 Weeks Prior to the Event (Check all that apply.)

Final Publicity & Details

- Invitations mailed – COS
- Include campus map information
- Graphics & Publicity
 - Flyers, posters, tickets, and table tents
 - Signage/yard sign
 - Banner artwork to vendor
 - T-shirt & promo item design to vendor
 - Photographer
 - Web graphics: banners and CTAs
- Office of Student Development (ext. 3215)
 - Stall Street Journal
 - Café Slide Show
- PR/Marketing
 - Press Release
 - Newspaper ad
 - Marquee
 - Webpage banner/CTAs placement
 - MyJeffco announcement
- Social Media
- Finalize accommodations for speaker and guests
- Request payment for all bills, if not completed previously
- Request cash box from Cashier with start-up cash and denomination breakdown

1-2 Weeks Prior to the Event (Check all that apply.)

Final Details	
<input type="checkbox"/> Registration/Check-in	<input type="checkbox"/> Contact Graphics
<input type="checkbox"/> Print nametags and have a supply of blank tags, if applicable	<input type="checkbox"/> i am jeffco Facebook page
<input type="checkbox"/> Prepare miscellaneous items to bring to the event: Conference/meeting information packet, pens, markers, paper, tape, equipment, documents, presentation, badges, extra equipment, business cards, printed handouts of print materials, etc.	<input type="checkbox"/> Photographer confirmed
<input type="checkbox"/> Information table	<input type="checkbox"/> Contact PR/Marketing
<input type="checkbox"/> Trash receptacles	<input type="checkbox"/> MyJeffco announcement
<input type="checkbox"/> Coat racks	<input type="checkbox"/> Social Media
<input type="checkbox"/> Prepare and distribute a set-up diagram for your event	<input type="checkbox"/> Finalize Set Up
<input type="checkbox"/> Notify the caterer with an exact number of attendees, if applicable	<input type="checkbox"/> Overhead projector
<input type="checkbox"/> Confirm time and location with all vendors, and provide set-up itinerary to them	<input type="checkbox"/> Slide projector
<input type="checkbox"/> Tickets & programs printed	<input type="checkbox"/> Data projector
	<input type="checkbox"/> CD player
	<input type="checkbox"/> DVD player
	<input type="checkbox"/> VHS/videocassette player
	<input type="checkbox"/> Audiocassette player
	<input type="checkbox"/> Laptop
	<input type="checkbox"/> Permission of speaker/presenter
	<input type="checkbox"/> Podium with microphone
	<input type="checkbox"/> Lavalier (small clip-on microphone)
	<input type="checkbox"/> Microphones for panel
	<input type="checkbox"/> Special requests

Day of the Event (Check all that apply.)

<input type="checkbox"/> Ensure set-up is underway/on schedule and results in intended outcome
<input type="checkbox"/> Cash box
<input type="checkbox"/> AV needs in place
<input type="checkbox"/> Registration table

After the Event (Check all that apply.)

<input type="checkbox"/> Assess the event (collect feedback formally or informally)
<input type="checkbox"/> Show appreciation (send thank-you notes to participants, speakers, photographers, VIPs, or other special contributors)
<input type="checkbox"/> Document (save copies of emails, contracts, orders, guest lists, notes from meetings, etc.)

Resource Documents (Check all that apply.)

<input type="checkbox"/> Catering & Food Service Guidelines
<input type="checkbox"/> _____
<input type="checkbox"/> _____
<input type="checkbox"/> _____