**Detailed Event Checklist**

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| **2 to 4 months before event or more depending on the size of the event** | | | | |
| **Item** | **Completion date** | **Assigned to** | **Date completed** | **Notes** |
| Complete Pre-Event Planning Form   * *To request for Chancellor Michael Alexander to attend an event, you will need to complete this form and email it to* [*Kassie Linzmeier*](mailto:linzmeik@uwgb.edu)*, Manager of Events and Annual Giving,* ***2 months prior to the event****.* * *Reference Template 1* |  |  |  |  |
| Create a Budget  *Reference Template 2* |  |  |  |  |
| Reserve Location   * *Allow as much time for this as possible. Also consider a backup location just in case your first choice falls through.* * *Accessible to outside visitors, there is sufficient parking, purposeful space for groups, etc.* * *Contact Information*   + *University Union: (920) 465-2462 or* [*unionres@uwgb.edu*](mailto:unionres@uwgb.edu)   + *Weidner Center: (920) 465-2726 or* [*weidner@uwgb.edu*](mailto:weidner@uwgb.edu)   + *Kress Events Center: (920) 465-2064 or* [*haackb@uwgb.edu*](mailto:haackb@uwgb.edu) |  |  |  |  |
| Create Preliminary Agenda of Event |  |  |  |  |
| Invitation Design   * *Submit a* [*Project Request Form*](https://www.uwgb.edu/marketing-and-university-communication/request-services/request-services/) *with University Marketing and Communications* ***3 months prior to the event.*** |  |  |  |  |
| Order Catering   * *UW-Green Bay catering is ordered online through* [*Chartwells*](https://www.uwgb.edu/union/reservations/catering/)*. For all catering inquires and to place catering orders, log into* [*Catertrax*](http://www.UofWGB.catertrax.com)*. For more information, reach out to* [*Michelle Rohde*](mailto:rohdem@uwgb.edu)*, Catering Director.* * *Please keep in mind the details below.*   + *Will the meal be plated, passed or buffet style?*   + *Chancellor/VIP tables served first.*   + *Label food so attendees know what’s being served. (i.e. include menu in the printed program and/or food cards on buffet tables)*   + *Will there be a hosted bar?*   + *Consider special dietary needs of guests.*   + *What will be preset on the table? (salad, dinner rolls, beverages, dessert)*   + *Chartwells requires you to provide a final guest count* ***5 days prior to the event.*** |  |  |  |  |
| **1 to 2 months before event** | | | | |
| **Item** | **Completion date** | **Assigned to** | **Date completed** | **Notes** |
| Mail/Email Invitation   * *Send* ***5 to 6 weeks prior to the event.*** * *Set RSVP deadline* ***1 week prior to the event.*** * *If there will be catering at your event, ask them about dietary needs.* |  |  |  |  |
| Chancellor Speaking Script   * *Please work with* [*Ben Joniaux*](mailto:joniauxb@uwgb.edu)*, Chief of Staff, to create the script.* |  |  |  |  |
| Develop Volunteer Plan and Recruit |  |  |  |  |
| Book Photographer   * *Contact Daniel Moore, University Videographer/Photo,* ***1 month prior to the event.*** * *For more information, visit the photography and videography* [*page*](https://www.uwgb.edu/marketing-and-university-communication/services/photo-video/)*.* |  |  |  |  |
| Determine Venue Details   * *Set-up (rounds, classroom, crescent, theater, etc.)* * *Coat rack* * *Decorations*   + *Centerpieces (green and white)*   + *Consistent UW-Green Bay feel*   + *Upscale collegiate appearance* |  |  |  |  |
| Determine Audio Visual Details   * *Microphone, speakers, LCD projector, screen, laptop, piped-in music, podium with UW-Green Bay Logo, etc.* * *Contact Information*   + *University Union: (920) 465-2462 or* [*unionres@uwgb.edu*](mailto:unionres@uwgb.edu)   + *Weidner Center: (920) 465-2726 or* [*weidner@uwgb.edu*](mailto:weidner@uwgb.edu)   + *Kress Events Center: (920) 465-2064 or* [*haackb@uwgb.edu*](mailto:haackb@uwgb.edu)   + *University Academic Space: (920) 465-2309 or* [*helpdesk@uwgb.edu*](mailto:helpdesk@uwgb.edu) * *If there will be a presentation, create a PowerPoint for the event. Use an approved* [*template*](https://www.uwgb.edu/marketing-and-university-communication/identity/templates/) *from Marketing and Communications.* |  |  |  |  |
| Confirm Parking Details   * *Public Safety: (920) 465-2300 or* [*police@uwgb.edu*](mailto:police@uwgb.edu) |  |  |  |  |
| Confirm Speakers/Presenters for Event   * *Reserve speakers/presenters and provide them with speaking points.* |  |  |  |  |
| Book Entertainment   * *If you plan to use student entertainment, reach out to the faculty or staff advisor to work out details.* |  |  |  |  |
| Determine if Gifts or Favors are Needed |  |  |  |  |

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| --- | --- | --- | --- | --- |
| **Month of event** | | | | |
| **Item** | **Completion date** | **Assigned to** | **Date completed** | **Notes** |
| Send Follow Up Emails and Make Follow Up Phone Calls   * *Email or call guests who haven’t RSVP’d* ***10 days prior to the event.*** |  |  |  |  |
| Create a Run of Show Document   * *The Run of Show document is a one-page document that is used in planning the sequence of events that are to take place during the entire event. In other words, it is a timeline or agenda for the event.* * *Put thought into how you would like the show to flow. Make sure the order runs smoothly.* |  |  |  |  |
| Determine if there Needs to be Directional Signage at Event |  |  |  |  |

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| --- | --- | --- | --- | --- |
| **Week of event** | | | | |
| **Item** | **Completion date** | **Assigned to** | **Date completed** | **Notes** |
| Send List of Responsibilities to Volunteers   * *Assign volunteers to the check in table, greeting, opening doors, taking coats, etc.* * *Make sure they know of proper attire.* |  |  |  |  |
| Send Final Guest Count to Caterer   * *Chartwells requires you to provide a final guest count* ***5 days prior to the event.*** |  |  |  |  |
| Send Confirmation Email to Guests   * *Send guests a reminder email that includes event information, a map and guest information.* |  |  |  |  |
| Create Seating Chart   * *Reserve table for VIP’s (if applicable)* |  |  |  |  |
| Gather Registration Table Supplies   * *Nametags (UW-Green Bay faculty and staff may wear University issued nametags)* * *Check-in sheets (sort alphabetically)* * *Seating chart* * *Tablecloth* * *Box of supplies (pens, markers, scissors, tape, extra blank nametags and holders, rubber bands, etc.)* |  |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Day of event** | | | | |
| **Item** | **Completion date** | **Assigned to** | **Date completed** | **Notes** |
| Prepare Volunteers for their Roles and Expectations   * *If students are attending, please encourage them to sit in front and disperse among other attendees.* |  |  |  |  |
| Do a Test of the AV Equipment   * *Make sure the sound is clear and has a good pitch.* * *Test video and music to make sure it works properly.* |  |  |  |  |
| Setup Registration Table |  |  |  |  |
| Place Table Numbers and Place Cards on Tables |  |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Post event** | | | | |
| **Item** | **Completion date** | **Assigned to** | **Date completed** | **Notes** |
| Send Thank You Card or Email   * *It is always recommended to send guests a thank you note or email after the event.* |  |  |  |  |

*Keep in mind this checklist might not include all of your event needs.*

*It should be used as a resource to help you plan a successful event and meet deadlines.*

**Template 1**

**Pre-Event Planning Form**

Good planning is essential to a successful event. This pre-event planning form provides you with a series of questions to consider when planning your next event. Please keep in mind that all activities should be consistent with university policies and procedures.

This form is provided as a resource. To request for Chancellor Michael Alexander to attend an event, you will need to complete this form and email it to [Kassie Linzmeier](mailto:linzmeik@uwgb.edu), Manager of Events and Annual Giving, **2 months prior to the event**. His office will respond, using the contact information you provide, to confirm his attendance and role. If Chancellor Alexander accepts your invitation Kassie will be in touch to gather more information closer to your event.

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| --- |
| **EVENT INFORMATION** |

|  |  |
| --- | --- |
| Name of Event: |  |
| Date: |  |
| Time: |  |
| Location: |  |
| Backup Location (if needed): |  |
| Estimated Attendance: |  |
| Budget |  |

|  |
| --- |
| What is the purpose of the event? How does this event promote the mission of UW-Green Bay? |
|  |
|  |

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| **CONTACT INFORMATION** |

|  |  |
| --- | --- |
| Primary Contact Name: |  |
| Primary Contact Email: |  |
| Primary Contact Cell: |  |

|  |  |
| --- | --- |
| Secondary Contact Name: |  |
| Secondary Contact Email: |  |
| Secondary Contact Cell: |  |

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| **CHANCELLOR REQUEST** |

|  |  |
| --- | --- |
| Do you request the Chancellor’s Attendance? |  |
| Role of the Chancellor: |  |

*Please be as complete as possible. You will be notified within 7 days if your request is approved.*

**Template 2**

**Sample Budget for Event**

|  |  |  |
| --- | --- | --- |
|  | **Estimated** | **Actual** |
| Total income |  |  |
| Total expenses |  |  |
| **Total raised** | **$0.00** | **$0.00** |

**INCOME**

|  |  |  |
| --- | --- | --- |
| **Event proceeds** | **Estimated** | **Actual** |
| Entry Fees |  |  |
| Ticket Sales |  |  |
| Other income |  |  |
| **Totals** | **$0.00** | **$0.00** |

|  |  |  |
| --- | --- | --- |
| **Extra sales** | **Estimated** | **Actual** |
| Live Auction |  |  |
| Silent Auction |  |  |
| Raffle/Drawing |  |  |
| **Totals** | **$0.00** | **$0.00** |

|  |  |  |
| --- | --- | --- |
| **Sponsorships** | **Estimated** | **Actual** |
| Major sponsors |  |  |
| Minor sponsors |  |  |
| Other sponsors |  |  |
| **Totals** | **$0.00** | **$0.00** |

|  |  |  |
| --- | --- | --- |
| **Donations** | **Estimated** | **Actual** |
| Donations |  |  |
| **Totals** | **$0.00** | **$0.00** |

**EXPENSES**

|  |  |  |
| --- | --- | --- |
| **Venue** | **Estimated** | **Actual** |
| Room fees |  |  |
| Venue staff fees |  |  |
| Permits, licenses |  |  |
| **Totals** | **$0.00** | **$0.00** |

|  |  |  |
| --- | --- | --- |
| **Equipment/AV** | **Estimated** | **Actual** |
| Audio equipment |  |  |
| Visual equipment |  |  |
| Lighting equipment |  |  |
| AV staff fees |  |  |
| **Totals** | **$0.00** | **$0.00** |

|  |  |  |
| --- | --- | --- |
| **Catering** | **Estimated** | **Actual** |
| Food |  |  |
| Beverages |  |  |
| Linen |  |  |
| Tables and chairs |  |  |
| Catering staff fees |  |  |
| **Totals** | **$0.00** | **$0.00** |

|  |  |  |
| --- | --- | --- |
| **Decorations** | **Estimated** | **Actual** |
| Balloons |  |  |
| Flowers |  |  |
| Centerpieces |  |  |
| **Totals** | **$0.00** | **$0.00** |

|  |  |  |
| --- | --- | --- |
| **Publicity/printing** | **Estimated** | **Actual** |
| Invitation printing |  |  |
| Graphic designer fee |  |  |
| Postage |  |  |
| Banners/signage |  |  |
| **Totals** | **$0.00** | **$0.00** |