**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, complete this form and email it to the Chancellor’s office, 2 months prior to the event.* ***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*
	+ *Weidner Center: (920) 465-2726 or* *weidner@uwgb.edu*
	+ *Kress Events Center: (920) 465-2064 or* *urec@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**, 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 the chancellor’s office, 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*
	+ *Weidner Center: (920) 465-2726 or* *weidner@uwgb.edu*
	+ *Kress Events Center: (920) 465-2064 or* *urec@uwgb.edu*
	+ *University Academic Space: (920) 465-2309 or* *gbit@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*
 |  |  |  |  |
| 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.)*
 |  |  |  |  |

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| **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 |  |  |  |  |

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| **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**

This form is provided as a resource. To request for Chancellor Michael Alexander to attend an event, complete this form and email it to the Chancellor’s office, **2 months prior to the event**. His office will respond using the contact information you provide to confirm his attendance and role.

Note: All activities at the event should be consistent with University policies and procedures.

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| **EVENT INFORMATION** |

|  |  |
| --- | --- |
| Name of Event: |  |
| Date: |  |
| Time: |  |
| Location: |  |
| Estimated Attendance: |  |
| Budget: |  |

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| 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** |

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| --- | --- |
| 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.*

*Email this form to* *chancellor@uwgb.edu**.*

*Questions? Call 920-465-2207*

**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** |