OFFICE OF SPECIAL EVENTS

**Planning Check List**

Event Name:   
Date:  
Time:

**Initial Planning**

* Initial Room Request submitted

(<http://site.www.umb.edu/spacerequest/>) \_\_\_\_\_

* Photography request submitted \_\_\_\_\_

(<http://www.umb.edu/news_events_media/communications_photo_request>)

* Alcohol request submitted

(<http://www.umb.edu/news_events_media/events/special/policies/alcohol/special_events_alcohol_request_form>)

\_\_\_\_\_

* Chancellor request submitted

([www.umb.edu/editor\_uploads/images/special\_events/ChancellorRequestForm.doc](http://www.umb.edu/editor_uploads/images/special_events/ChancellorRequestForm.doc)) \_\_\_\_\_

* Publications Request

(<http://site.www.umb.edu/creative_services/req/>) \_\_\_\_\_

* Event Supplies List \_\_\_\_\_

([www.umb.edu/editor\_uploads/images/special\_events/Event\_Tools.doc](http://www.umb.edu/editor_uploads/images/special_events/Event_Tools.doc))

* Chancellor’s Reserved Seat Sign \_\_\_\_\_

([www.umb.edu/editor\_uploads/images/special\_events/RESERVED%20CHANCELLOR%20seatsign.ppt](http://www.umb.edu/editor_uploads/images/special_events/RESERVED%20CHANCELLOR%20seatsign.ppt))

* Chancellor’s Reserved Table Sign \_\_\_\_\_

([www.umb.edu/editor\_uploads/images/special\_events/RESERVED%20CHANCELLOR%20tablesign.ppt](http://www.umb.edu/editor_uploads/images/special_events/RESERVED%20CHANCELLOR%20tablesign.ppt))

* Name Tag Template \_\_\_\_\_

([www.umb.edu/editor\_uploads/images/special\_events/sail\_name\_tags.docx](http://www.umb.edu/editor_uploads/images/special_events/sail_name_tags.docx))

* Venue Contract \_\_\_\_\_
* Initial Budget Estimate \_\_\_\_\_
* Entertainment/Keynote Confirmed \_\_\_\_\_

Invitations/Communications

* Save the date (4-6 months prior to event)
* Invitation (4-6 weeks prior to event)

Program \_\_\_\_\_

* + Finalized \_\_\_\_\_
* E-Mail Correspondence \_\_\_\_\_
  + E-vite \_\_\_\_
  + Reminders/updates \_\_\_\_
  + Web and other advertising \_\_\_\_

OFFICE OF SPECIAL EVENTS

Planning Check List (Cont’d)

**Details**

* Parking organized \_\_\_\_\_
* Signage Ordered \_\_\_\_\_
* Staffing/Volunteers Confirmed \_\_\_\_\_
* Gifts/give aways ordered \_\_\_\_\_
* Remarks/Timeline \_\_\_\_\_
* Room Set Up Confirmed \_\_\_\_\_
* Name Tags \_\_\_\_\_
* Hotel Accommodations \_\_\_\_\_
* ADA Requirements \_\_\_\_\_
* PO’s/Payments Approved \_\_\_\_\_

* Catering: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
  + Final headcount \_\_\_\_\_
  + Protocol Review/Consult with

Special Events \_\_\_\_\_

* Seating/Table Assignments \_\_\_\_\_

* Directional Signs \_\_\_\_\_
* Presentation Slides \_\_\_\_\_
* Videographer \_\_\_\_\_
* Vendor Schedule to venue \_\_\_\_\_
* Meals for Volunteers \_\_\_\_\_
* Inventory/Day of Supplies \_\_\_\_\_
* Thank you Letters Drafted \_\_\_\_\_
* Debrief Meeting Scheduled \_\_\_\_\_

**POST EVENT DETAILS**

* Hold Debrief Meeting \_\_\_\_\_
* Send Thank you notes \_\_\_\_\_
* Photos/letters distributed \_\_\_\_\_
* Return extra parking Passes \_\_\_\_\_
* Submit All final Invoices \_\_\_\_\_
* Finalize budget/analysis \_\_\_\_\_

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