



Event Planning Guide

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EVENT PLANNING STRATEGIC QUESTIONS

Events are critical tools for institutional advancement. Some of the basic issues surrounding events are very straightforward: location, date, time, etc. But events should never be ends in themselves, but rather means to our ends.

Work with your client to answer the following questions. Answering these questions will ensure that the event will provide tangible value.

Overall Goals and Objectives

- Is an event the best/most appropriate way to achieve goals (versus, for example, a press release or other targeted communication)?
- What are the key goals/objectives of this event? Specifically, what is the desired outcome and what do you want your guests to take away from this experience?
- What is the long-term value of the activity to Pillar?

Communications & Marketing

- What are your event's primary message and themes? If you will have speakers, who would be appropriate (legislator, administrator, etc.)? If there are multiple speakers, how will their messages be appropriately differentiated and integrated? How will this program be "choreographed?"
- What are the ways this event will be marketed? How can we gain greater effectiveness/leverage from this event – **before** and **after**? Consider how your message will be communicated or reinforced through invitations and publications .
- Do the printed materials (design and copy) clearly reflect/identify Pillar?

Planning & Production

- What groups should comprise the audience? Who else might benefit from this event beyond the primary attendees? If it's appropriate and feasible within budgetary constraints, consider whether it makes sense to include alumni, donors, community members, legislators, media, and staff.
- Are there opportunities to partner/collaborate across?
- What is the best date and location for this event? Why?

BUDGET PLANNING CHECKLIST

FOOD SERVICE

- Number of people to be served
- Cost per person
 - Coffee hour
 - Luncheon
 - Dinner
 - Afternoon break
 - Cocktail hour
 - Liquor – full bar or “light” bar (beer, wine, soft drinks)
 - Wine
 - Other beverages
- Bartenders
- Bar setup and glassware
- Ice/Condiments
- Table linen
- Rented table service
- Kitchen setup
- Waiters trays and stands
- Gratuities/Service charge
- Labor
- Sales tax

VENUE COSTS

- Rental of meeting or reception room(s)
- Overnight accommodations
- Rentals
- Special electrical or telephone hookups
- Set-up and clean-up charges
- Venue/Stage managers
- Stage crew
- Coat check staff
- Parking/Traffic control staff
- Security
- House staff

EQUIPMENT RENTAL

- Canopy or tent
- Tables
- Chairs
- Flooring or carpeting

- Risers
- Ropes or stanchions
- Podiums/podium lights
- Props
- Registration tables and chairs
- Portable restrooms
- Booths
- Heaters
- Fans
- Easels/Sign standards/Weights
- Coat racks/Hangers
- Mirrors
- Backdrop or trellis
- Trash containers
- Lighting
- Sound
- Fencing
- Generators
- Delivery/strike
- Catering kitchen rentals
 - Tables
 - Ovens
 - Lights
 - Tents/Trellis

DESIGN AND PRINTING

- Fee for design concept and package
- Advance announcements/save the dates
- Invitations
- Confirmation cards
- Programs
- Tickets
- Maps
- Placecards/table assignments
- Signs
- Registration packets
- Name tags and holders
- Table numbers
- Alphabetical registration cards
- Credentials
- Any other printed materials

POSTAGE AND SHIPPING

- Postage for mailing printed materials
- Bulk mail of promotional materials
- Mailing house charges
- Shipping and handling

TRANSPORTATION

- Shuttles
- Parking and attendants
- Valet
- Traffic control
- Traffic directional signage

DECORATIONS

- Flowers
- Table decorations
- Extra plants
- Props
- Candles/candelabra/votive
- Direction signs
- Podium décor
- Stage scenery
- Other decorations (i.e. ribbon, balloons, etc.)

AUDIO-VISUAL EQUIPMENT

- Slide, data, overhead and film projectors
- Teleconferencing services
- Screens
- Extension cords
- Projector carts
- Microphones
- Mixers
- Speaker system
- Teleprompter
- Jumbotron
- Malt boxes/Press patch
- Computers
- Still store
- Tape recorder
- Television monitors
- VCRs
- Pointers

- Flip charts
- Blackboards/white board
- Technician and operator services

FACILITIES

- Grounds
- Custodians
- Electricians

ENTERTAINMENT

- Fees
- Instrument rental
- Promoter fees
- Additional equipment (i.e. speakers, monitors, music stands)
- Hospitality

PUBLICITY

- Advertising
- Photographer
- Printed photos/photo albums/proof sheets
- Videographer
- Slides
- Mailing
- Entertaining/hospitality for the press
- Press room office equipment (computers, fax, copiers)
- Banners

OFFICE EXPENSES

- Overtime and compensatory time
- Additional staff (temporaries, students)
- Data processing
- Telephones and toll charges
- Duplicating
- Postage for general correspondence
- Supplies (pens, pads, decals, folders, nametags)
- Committee materials
- Cuebook materials
- Hospitality for committee members/volunteers
- Complimentary tickets
- Staff accommodations
- Staff travel and expenses

MISCELLANEOUS

- VIP travel and expenses
- Honoraria
- Gifts
- Mementos
- Security
- Fire marshal
- Medical personnel
- Taping and transcribing proceedings
- Permits
- Internet access (Web design, Web-casting)

RENTAL WORKSHEET

Vendor Information	Checklist	Completed	Date
Name of company _____	Outline initial rental needs		__/__/__
Contact person _____	Schedule site walkthrough		__/__/__
Phone number _____	Discuss initial setup with vendor		__/__/__
Alternate contact _____	Obtain estimate		__/__/__
Alternate phone _____	Obtain schematic outlining setup		__/__/__
“Day of” phone _____	Ensure vendor has adequate insurance		__/__/__
Cell phone _____	Establish purchase order		__/__/__
Fax number _____	Confirm order		__/__/__
Email _____	Deposit paid		__/__/__
Things to ask:		\$.....	
Cancellation policy Yes _____ No _____	Ensure fire marshal has approved setup/tent permits		__/__/__
Deposit required Yes _____ No _____	Finalize setup with vendor		__/__/__
Deposit due date __/__/__	Final site walkthrough		__/__/__
Insurance certificate Yes _____ No _____	Grand total		__/__/__
Setup time From _____ To _____		\$.....	
Event time From _____ To _____	Balance paid		__/__/__
Strike time From _____ To _____		\$.....	

Notes/Suggestions

General

- Reserve equipment well in advance. Most rental companies only have a limited supply of product to rent.
- Carefully walk through your event and note every conceivable rental item you will need.
- Discuss with your rental company the various rental equipment options they have – inventory changes frequently.
- Make sure your rental company provides a site schematic showing the placement of all rentals within the venue.
- Once equipment is ordered, double-check the rental order to ensure the vendor has noted all of your equipment on his paperwork. Confirm delivery and strike times and make sure they are noted on the order.
- Be aware that the order total may not be the final cost. The client generally assumes any breakage or loss occurring after delivery.
- Confirm whether the rental company will be setting up the equipment, or if it is a drop-off

only. Generally they charge extra for setup.

- Make sure to include your rental vendor at any logistical walk through you may have before the event.
- Upon delivery, inspect the equipment to make sure everything you ordered is delivered and in serviceable condition.
- Ensure that delivered rental equipment will be safe and secured. You may need to hire security to watch equipment if it is in an exposed/unsupervised area to prevent loss/vandalism.

Equipment specifics

- When renting outdoor heaters, kitchen tables or trash bins, have the rental company wrap them in velon or provide a covering.
- Verify if trash cans need to be rented for event space and/or kitchen and request trash liners if the caterer does not provide.
- Make sure someone on site for the event knows how to light the heaters.
- Make sure there are an adequate number of heaters in cold weather and table umbrellas in hot weather to ensure guest comfort.
- When renting easels, always rent sandbags to steady them.
- When renting tables, press down on the tables once they are set up to make sure their locking mechanism is in place to prevent collapse.
- If renting a riser, ask the rental company to top and skirt the platform with Astroturf. Don't forget to order steps, if needed.
- Make sure any lecterns ordered are in good condition – they are often photographed during program shots.
- Your caterer can advise you on any rentals, such as kitchen equipment and table service, they need for food service.
- Don't forget to rent tables and chairs for any staff or vendors who will be working your event, such as registration volunteers, audiovisual technicians, disc jockeys, etc.
- When renting coat racks for coats, don't forget to order hangers and coat check tickets.
- Approximately 10 guests can sit at a 60" round table; 10 to 12 may sit at a 66" round table; 5 may sit at a 36" cocktail table.
- Always try to rent table linens that go to the floor – your rental contact can advise you on the appropriate size to order.

Tents

- Do not use a clear tent for a daytime event. Heat is magnified under them and makes the temperature very uncomfortable for guests. Clear sidewalls are okay.
- Tent flooring is encouraged if there is any chance high pedestrian traffic could create unsafe, muddy conditions on grass.

EVENT VOLUNTEER WORKSHEET

Volunteer Information	Checklist	Completed	Date
Volunteer coordinator _____	Assess volunteer needs/roles		__/__/__
Phone number _____	Draft volunteer job descriptions		__/__/__
“Day of” phone _____	Send out volunteer request		__/__/__
Email _____	Assign volunteers to roles		__/__/__
	Schedule volunteer training meeting		__/__/__
	Send confirmation and instructions		__/__/__
	Formally thank volunteers		__/__/__

Notes/Suggestions

Responsibilities

- Have a job description for your volunteers, with responsibilities clearly outlined.
- Don't use your volunteers for anything you wouldn't do yourself.
- Treat volunteers with respect.
- If possible, let the volunteer pick the job they want to do or assign volunteers to tasks they will enjoy doing.
- Keep volunteers busy – have tasks for them to accomplish. Otherwise, they may feel they are not needed.

Recruitment and Training

- Appoint a staff coordinator to answer questions and serve as a point of contact/information source for volunteers.
- Prior to the event, send all volunteers a note thanking them for volunteering and giving them an idea of what will happen next and when. Keep them in the communication loop.
- Schedule an orientation and training session – if possible prior to the event day. Include the nature of the event, its purpose, their duties, what tasks they are required to do and how to do them, where the closest amenities/services are (i.e. bathrooms, food facilities, telephones, fire pull stations) what time they should arrive, what they should and should not bring, where to park, and what to wear. Also provide this information in writing for their reference.
- Make sure to provide them with event contact names/ phone numbers/email addresses, including day of information, in case of emergencies or if they have any questions.
- Provide general volunteer guidelines applicable to your event, such as:
 - Dress neatly in your volunteer “uniform”
 - Be punctual
 - Check in with volunteer coordinator upon arrival and prior to departure

- No consumption of food or beverage in view of guests, unless approved by volunteer coordinator and only after all guests have been served
- No smoking
- Be pleasant to everyone at all times
- Wear nametag/badge at all times
- Remember you are at the event to work – you are not a guest
- Report any concerns/issues to volunteer coordinator
- Do not use personal cell phones or other communication devices except when authorized
- Do not seek autographs, photographs or paraphernalia from dignitaries or celebrities
- Be proactive in providing assistance to guests

General

- Provide positive feedback and encouragement.
- Get day of contact information for volunteers and prepare a master contact list in case of emergency.
- Have the volunteer coordinator oversee the duties of volunteers the day of the event, to answer questions and provide assistance and trouble-shooting.
- Introduce volunteers to each other.
- At all-day/long events, provide food, water and breaks to volunteers.
- Prepare for no-shows by double booking some of your volunteer slots.
- Ask volunteers for feedback, such as ideas to improve the event, questions asked by guests, and the volunteer experience.
- Provide volunteer recognition and thanks, such as a thank you letter, pizza party, or recognition in Pillar's newsletter.

CATERING WORKSHEET

Vendor Information		Checklist	Completed	Date
Name of caterer	_____	Choose dining format (reception, dinner, etc.)		__/__/__
Contact person	_____	Estimate guest count		__/__/__
Phone number	_____	Get estimate/proposals		__/__/__
Alternate contact	_____	Choose caterer		__/__/__
Alternate phone	_____	Ensure caterer has adequate		__/__/__
"Day of" phone	_____	insurance		
Cell phone	_____	Establish purchase order		__/__/__
Fax number	_____	Set up tasting		__/__/__
Email	_____	Choose menus		__/__/__
Banquet captain	_____	Contract signed		__/__/__
Things to ask:		Deposit paid		__/__/__
Cancellation policy	Yes No		\$.....	
Deposit required	Yes No	Finalize menus		__/__/__
Deposit due date	__/__/__	Discuss special menu needs (kosher, low fat, vegetarian)		__/__/__
Insurance certificate	Yes No	Head count guarantee/seating		__/__/__
Liquor license	Yes No	Grand total		__/__/__
Service rate (gratuity)	_____		\$.....	
Tax rate	_____	Balance paid		__/__/__
Overage percentage	_____		\$.....	

Notes/Suggestions

Catering/menu/contract details

- Read BEO (banquet event order) carefully to ensure it reflects all details of your order, including date of event, timing of service, deposit requirements, billing, cancellation policies and gratuity percentage.
- Food prices are often quoted "plus plus" – the service and the sales tax – meaning those figures are not calculated in the price per person and must be added in to the overall cost.
- When you provide the catering guarantee, be conservative. The average no-show rate is 10%.
- Most caterers build a plus-or-minus percentage overage (often 3-5%) into the guarantee.
- Give banquet manager a copy of your program and walk through the timing with them.

Menu planning

- Provide a variety of foods, and always offer vegetarian/healthy selections. Be mindful of possible allergies and offer options.
- Be mindful of cultural preferences for international guests.

- When serving sodas, offer regular, diet, and caffeine-free. For coffee service, provide 70% regular and 30% decaffeinated.
- Make sure hors d'oeuvres or finger foods can be eaten in one or two bites easily, or ask for mini versions.
- Make sure eating utensils are provided when appropriate – some guests prefer to eat even finger foods with utensils
- Do not trim budgets by reducing the quality of the food or number of wait staff – instead consider alternatives to expensive items.
- For pre-meal cocktail hours, four to six hors d'oeuvres per person per hour is adequate. For receptions, plan on five to seven pieces per person per hour, plus a stationary display or two. For each subsequent hour, decrease the number of pieces.

Alcohol

- If admission fees or money is exchanged at an event, even a tip cup, the personnel pouring the alcohol must have a liquor license.
- Offer both white and red wine.
- Generally allow 2.5 glasses of wine per person. On average, there are 5 glasses in a bottle and 12 bottles in a case.
- If the liquor vendor allows unopened wine to be returned, ask for a cork or bottle count to double check overage at end of the event.
- If students are attending an event where alcohol is served, plan to check identification at bars.
- Always serve food when alcohol is served, but be mindful of what is served – salty snack foods encourage dehydration.
- Give wait staff authority to cut off inebriated guests and have taxi phone numbers as a back up.

Staffing guidelines

- Need one bartender for every 75 to 100 people.
- Need one server for every 15 people for sit-down meal (if quick service is required, pay extra for one server for every 10).

Setup/service

- Need one double-sided buffet line for every 75 to 100 people.
- Have beverage service ready 30 minutes prior to the start of event, with food ready 15 minutes prior, to avoid quality deterioration.
- Recommend no catering service during your program – if appropriate, have wait staff leave carafes of coffee or beverage on tables.

VENUE WORKSHEET

Vendor Information	Checklist	Completed	Date	
Name of venue _____	Choose initial venue(s)		__/__/__	
Room/space held _____	Obtain fee/reservation information		__/__/__	
Capacity _____	Obtain venue floor plans		__/__/__	
Date(s) reserved ____/____/____ - ____/____/____	Obtain initial contract from venue		__/__/__	
Contact person _____	Call Real Estate if facility use agree-		__/__/__	
Phone number _____	ment			
Cell phone _____	Call Insurance & Risk Management		__/__/__	
Fax number _____				
Email _____	Schedule site walkthrough		__/__/__	
Address _____	Discuss setup with venue manager		__/__/__	
	Discuss services/equipment venue can provide		__/__/__	
Things to ask:				
Cancellation policy	Yes	No	Confirm reservation/Sign contract	__/__/__
Deposit required	Yes	No	Establish purchase order	__/__/__
Deposit due date	____/____/____		Deposit paid	__/__/__
			\$.....	
Setup time	From _____	To _____	Finalize setup with venue	__/__/__
Event time	From _____	To _____	Final site walkthrough with venue	__/__/__
Strike time	From _____	To _____	Grand total	__/__/__
			\$.....	
			Balance paid	__/__/__
			\$.....	

Notes/Suggestions

General

- Choose a venue with the audience//program/theme in mind.
- Confirm venue can accommodate your number of anticipated guests, including any dining and catering tables, dance floors, stages, audiovisual equipment, etc. These components can impact the number of guests the room can accommodate.
- Visit the site and plot out with the venue manager where all of your event elements will go, i.e. registration location, stage, catering tables, kitchen facilities, green rooms, etc. Don't make assumptions – there may be safety restrictions on what can go where, such as maintaining aisle space, keeping doorways clear, and where kitchens can be located.
- Check to see what equipment/furniture/services the venue can provide for you and what you must obtain elsewhere.

- Ensure there are adequate parking and restroom facilities for your guests. Sometimes, additional restrooms need to be rented.
- Walk the route of your event from parking to all locations guests will visit to ensure accessibility for the elderly or disabled.
- When reserving venues, make sure you block enough time with the venue manager for setup and strike of the venue.
- Confirm electricity/water needs you may have and ensure there is adequate access/supply.
- If temporary storage is needed for registration materials, printed materials, etc., confirm location with venue manager.
- Make sure there are proper sightlines from all aspects of the room to the stage and video screens, if used.

Outdoor venues

- Audiovisuals, such as slides, video, or any other visual media are strongly discouraged at outdoor venues if the event is slated for daytime hours. It is difficult for guests to view them, even under a tent with sidewalls, as the venue doesn't get dark enough. If it cannot be avoided, rent plenty of large screens for all guests to view adequately from a close vantage point.
- Check sound levels on site in advance and note any ambient traffic/construction noise nearby to troubleshoot any sound issues.
- If the event is at night, visit the site, check sunset time, and determine if additional lighting/heating is needed.
- Have a rain contingency.

SPEAKER/PRESENTER WORKSHEET

Speaker Information	Requirements			
Name of speaker _____	Lectern	Yes	No	
Department/School _____	Microphone	Yes	No	
Contact person _____	- Type	Lavaliere	Lectern mic	
Phone number _____	Handheld			
Alternate phone _____	Data projector	Yes	No	
“Day of” phone _____	- Mail disk with	Yes	No	
Fax number _____	presentation			
Address _____	- Bring own laptop	Yes	No	
Email _____	Slide projector #.....	Yes	No	
	- Slide tray #.....	Yes	No	
	Video playback equipment	Yes	No	
	- Format	VHS	DVD	Betacam
Presentation title _____	Laser pointer	Yes	No	
	Who will run a/v			
Presentation date _____	presentation			
Presentation time _____	Checklist	Completed	Date	
Presentation length _____	Review schedule/Q&A		_/_/_	
Presentation location _____	Discuss presentation		_/_/_	
Participation confirmed	Obtain presentation title		_/_/_	
Yes	Obtain presentation synopsis		_/_/_	
Date	Obtain speaker bio		_/_/_	
_____/____/____	Obtain speaker photo		_/_/_	
Will have a guest list	Confirm transportation needs		_/_/_	
Yes	Discuss rehearsal schedule		_/_/_	
No	Send letter confirming		_/_/_	
Diet restrictions	logistics			
Yes				
No				
Request rehearsal				
Yes				
No				
Who will greet speaker _____				

Notes/Suggestions

Early Discussions

- Book speakers as early as possible. Popular speakers/personalities' calendars can be completely booked over a year in advance.
- Be clear with speakers about the nature of your event, what will be expected of them, the type of remarks they will be asked to deliver, the length of their remarks, deadlines, etc. so no misunderstandings take place.
- Follow up with the speaker in writing regarding their presentation and the discussions that took place, including printing deadlines.
- Request photo, bio, synopsis, etc. in plenty of time for printed material publication.

- Let the speaker know some editing of their bio and synopsis may take place, to ensure consistency with language/tone of printed materials. Make sure if any editing is done it is reviewed with the speaker for accuracy and approval.
- If travel arrangements are needed, such as airfare, hotel or driver, discuss the arrangements with the speaker early and clarify who will make the arrangements and how they will be paid for, i.e. will speaker pay first and then be reimbursed, etc.
- If hotel arrangements are made, it is nice to provide a hospitality gift in their room, including information on the event, copy of the agenda, guest list, etc.
- Provide the speaker with clear directions to campus, directions on where to park, how to access building via a campus map, etc.
- If the speaker is driving to campus, arrange for their parking and, if appropriate, a barricaded space in the parking lot/structure.
- Make sure the speaker is met and greeted by an official representative of the university to escort them and provide them with guidance.

Staging/Audiovisual

- Discuss with client if a “green room” is necessary – if one is used, provide refreshments, a mirror, and copies of the program inside.
- Make sure the lectern has a light so the speakers can read their notes and, if possible, a light focused on the lectern so the speaker will be visible to the guests, even if the room is darkened.
- Remember that speakers stand upon a “podium” or platform riser and speak behind a “lectern”.
- If the speaker is providing his or her own audiovisual equipment, be sure it is compatible with any audiovisual equipment you are providing. If you are unsure, ask your audiovisual technician.
- Make sure it is clear who is running the audiovisual presentation, whether the speaker will via remote, or whether they will ask an audiovisual technician to do so.
- If a screen is being used, make sure the speaker can see the screen from where they will present.
- Always make sure an audiovisual technician is available at speaker rehearsals/presentations to troubleshoot any problems.

SAFETY AND EMERGENCY PLANNING SHEET

Key Phone Numbers	Checklist (as appropriate)	Completed	Date
EMERGENCY <u>911</u>	Notify Special Events and Protocol of VIP attending event		__/__/__
Pillar Nonprofit Network			
Executive Director (cell)	Discuss event details with venue manager		__/__/__
Executive Director (home)	Obtain venue emergency plan		__/__/__
Board Chair	Discuss event details with Board		__/__/__
	Discuss event details with office Staff		__/__/__
	Hire standby nurse for event		__/__/__
	Use volunteers or hire security service to assist with access/crowd control		__/__/__
Venue/Event Details to Know			
Know all access points			
Know location of campus/pay phones			
Know disabled accessibility	Schedule walkthrough with all relevant safety/security personnel and venue manager		__/__/__
Know location of fire extinguishers			
Check if ice is available			
Have first aid kit	Create emergency action plan		__/__/__
Program emergency numbers			

Notes

Who, How and Why to Contact

- Program emergency numbers into cell phones and have emergency contact sheet available for all key staff.
- Venue managers know their buildings inside and out. Discuss with them your setup and have them point out areas of concern. Be sure they are available at any logistical walkthroughs to discuss any possible concerns with safety/security personnel.

Safety Mitigation, Planning , and Follow-up

- Do a risk assessment of the event – look at crowd safety and movement, fire risk, audience demographics (older guests with mobility issues, young guests drinking), and venue hazards.
- Create a contact sheet, including cellular phone numbers, of all persons to be notified in the event an emergency condition develops. Include walkie-talkie channels if walkie-talkies are utilized.
- Document your emergency action plan for your event and have with you at the event for reference.
- If available, obtain a copy of venue emergency procedures.
- Be aware of building exits and the location of fire extinguishers and fire alarm manual pull stations.

- Prepare an event emergency kit for your office and to take with you to events. Include in your kit a radio (put a sticker on the radio with local AM radio news stations and campus radio station), first aid supplies, a flashlight, and Ziploc bags (for holding ice).
- For larger events or those where venue setup may cause hazards (steep steps, uneven ground, etc.), hire a standby nurse or paramedic to handle minor accidents, or to assist until emergency personnel may arrive.
- If an accident occurs, document situation and get contact names of affected parties and witnesses, dates, times, etc.
- Discuss with your division head/director any follow up with injured parties, if appropriate.
- If VIPs or dignitaries will be present, discuss event security, including need for security access lists or credentials.
- Sponsoring departments hosting a dignitary at their event are responsible for any outside security costs related to ensuring security and safety at their event.
- If possible, maintain current first aid and CPR certifications.

EVENT TIMELINE

- Six Months To One Year Ahead
- Four Months To Six Months Ahead
- Two Months Ahead
- Two To Four Weeks Ahead
- One Week Ahead
- Event Day

SIX MONTHS TO ONE YEAR AHEAD

- Determine the purpose of the event.
- Plan and get budget approval.
- Select the date(s), but before confirming it, clear the date with important participants.
- Check for conflicts with other major functions within your department, and in the community.
- Create a printed materials timeline.
- Create an event marketing plan.
- Create a preliminary guest list or a list of committees/groups to be invited. Begin collecting addresses and inputting in the database for the Save-the-Date mailing.
- Select the theme.
- Select and reserve a facility.
- Develop a rain plan if the event is to be held outdoors.
- Reserve a block of hotel rooms, if necessary.
- Interview and choose a caterer.
- Interview and select an event designer.
- Select and order recognition items.
- Order favors, souvenirs, printed folders, and other give-away items.
- Identify a master of ceremonies and the program speakers. Send a letter of invitation.
- Discuss event insurance coverage.
- Get all necessary administrative approvals.

FOUR MONTHS TO SIX MONTHS AHEAD

- Plan and get approval of all printed/electronic materials (invitations, save-the-date cards, programs, tribute books, brochures, commemorative language on awards and plaques, promotional, and event-related advertisements).
- Finalize and get approval of the guest list.
- Design and mail Save-the-date announcements.
- Begin publicity.
- Confirm program participants. Obtain biographical information/publicity photos.

- Make hotel and transportation arrangements for out-of-town program participants/dignitaries.
- Make preliminary security arrangements.
- Determine audiovisual needs. Select an audiovisual company.
- Hire a photographer and videographer.
- Determine transportation needs and reserve vans, buses and shuttles.
- Select menu.
- Choose a rental company and reserve tables, chairs, tents and all rental needs.
- Choose and meet with the florist.
- Determine music – live or CD. Confirm entertainment bookings. Secure performance agreements.
- Print confirmation cards, tickets, credentials, and parking permits.

TWO MONTHS AHEAD

- Print invitations.
- Mail invitations (4-6 weeks prior to event)
- Finalize decor and venue arrangements.
- Mail an itinerary to speakers.
- Arrange for a gift to be presented to dignitaries/VIPs participating in the event.
- Recruit volunteers to assist with registration and other tasks to be assigned.
- Order directional and pedestrian event signs.
- Write and print the program.
- Order any ceremonial items needed such as Pillar logo signs.
- Inspect the venue and request cleaning and repairs to hazards.
- Finalize the audiovisual presentations.

TWO TO FOUR WEEKS AHEAD

- Record and acknowledge RSVPs as they are received; send confirmations tickets, parking permits by return mail.
- Prepare registration packets.
- Prepare table seating assignments and placecards for appropriate guests.
- Coordinate speeches and remarks for all program participants. If your event is taking place in another city, ship printed materials and other items to the meeting site. Call your contact person and ask how to label the shipment so that it will be accepted and not misplaced on arrival.
- Check publicity progress with your communications advisor. Revise and update plans if necessary.
- Finalize security plans.
- Send detailed final instructions to all speakers/dignitaries.

- Notify the caterer if the count seems to be significantly higher or lower than previously discussed.
- Take delivery of favors or mementos. Check for correct amount.
- Print table number signs for placement at event.
- Enlarge a diagram of the room to be used as a seating chart.

ONE WEEK AHEAD

- Ascertain the intentions of anyone who has not sent an RSVP.
- Print out the guest list in alphabetical order.
- Prepare a seating chart and print out a seating list in alphabetic and table number order.
- Finish table assignments and placecards.
- Prepare nametags
- Brief volunteers.
- Gather all presentation items such as gifts, plaques, and trophies. Collect all ceremonial items.
- Plan an arrival briefing for VIPs if necessary.
- Confirm arrangements with all vendors.
- Confirm security arrangements.
- Deliver prepared introductions, citations, and speeches to those who will read them.
- Make catering guarantees.
- Prepare your event box with any supplies, such as tape, string, zip ties, staplers, clipboards, baskets, etc. Put everything in a convenient, secure place, and designate one person to be in charge of transporting the items to the event site.

EVENT DAY

- Arrive early.
- Have all instructions, directions, phone numbers, banquet orders, seating charts, name tags, table assignments, guest lists, and event box with you.
- Check all facilities (including restrooms) and grounds.
- Set up event venue with place cards, signs, favors, awards, programs, etc.
- Set up registration. Be sure it is ready at least 30 minutes prior to the start of your event.
- Check parking attendants and ensure directional/pedestrian signs are in place.
- Relax and smile. Never intimate to your guests that things might be less than perfect. Chances are, no one but you will notice.

ESSENTIAL VOLUNTEERS/COMMITTEE CHAIRS

Event Chair(s) - oversees all activities relating to event from start to finish.

General Duties:

- Oversee the event at-large
- Generate budget
- Appoint committee chairs
- Determine theme
- Maintain communication with staff or key member of the organization
- *Most of the detail work will stay with the specific committee chairs below*

Corporate Relations/Sponsorships - helps raise necessary seed money for early event expenses and help event tickets or tables to corporations

General Duties (Strong collaboration between Event Chair(s) on this):

- Identify potential sponsors/donors: corporate and individual
- Determine possible benefits for sponsors with the Event Chairs- (most sponsors will want something in return for their investment whether it's free tickets to the event or marketing and advertising for the company)
- Deliver the promised benefits to sponsors
- Identify potential sponsors for the event (*Be sure to consider pro bono sponsors which will help alleviate expenses*)
- Draft strategy for acquiring sponsors
- Understand what you need and what you plan to give back to the sponsor (benefits plan)
- Generate all necessary paperwork
- Understand the traditional giving cycle of your target sponsor—don't ask for money too late!
Research your prospects.

Volunteer Coordinator Chair - recruits and energizes volunteers for all committees

General Duties:

- Identify volunteer needs for each committee
- Communicate regularly with volunteers on behalf of the Event Chair
- Recruit more volunteers as necessary
- Delegate tasks on the day of event

Media & Public Relations Chair - promotes the event

General Duties:

- Develop the language for promoting the event
- Identify media sponsors
- Work with Corporate Relations/Sponsorship Chair regarding press releases

- Communicate through various methods (TV, print, radio, web, email)

Other areas to consider once "core" committee members are determined and appointed.

- **Logistics Committee Chair** - oversees the details and the flow on the day of the event
- **Invitation Committee Chair** - oversees the designing and mailing the invitation
- **Decorations Committee Chair** - determines necessary decorations based on theme
- **Auction Committee Chair** - organizes all aspects of auction
- **Menu Committee Chair** - works with the caterer on food and drink choices
- **Entertainment/Program Committee Chair** - determines and contracts entertainment (bands)