

Event planner's checklist

This Leadership Resource Sheet will help you or your group:

- plan and implement an event
- organize necessary tasks and responsibilities chronologically

Know your event

Select your planning team

The size and scope of your event will help determine how large of a group is needed. The structure of your committee will also depend on your organization and your event—you may decide to have specific positions, at minimum, most planning teams find it necessary to have a chair and treasurer.

First things first

Use the following questions to help yourself establish why you are having an event.

- What do you want to achieve by having this program?
- Is there a current need or an interest in this program area?
- Has a similar event been held in the past? If yes, what was the response?
- Are your members enthusiastic about organizing this event?
- Is there enough time to thoroughly organize, publicize, and promote the program so that it will be successful?
- Is your event:
 - open to the public or exclusively for club members?
 - meant to inform (lecture, AGM, workshop) or entertain (out-trip, group meal, party, etc.)?
 - formal or informal?
 - small or large?
 - a new initiative or an annual legacy event?

Organizing is what you do before you do something, so that when you do it, it's not all mixed up. —A.A. MILNE

When you're organizing an event, it can be tough to think of everything – in fact, you probably won't! However, this resource sheet should give you an overview of some of the most common things event planners need to consider and can be used to help you prioritize your planning team's tasks. Timelines indicated below are suggestions only and may need to be adjusted based on the scope of your event. If you're unsure of an appropriate timeline, the Leadership & Involvement office can assist you with planning one – contact us!

Use your answers to the above questions along with any direction you have from your group or Club Executive to create event goals. Goals will make decision-making and planning priorities clear.

Two months before the event

Logistics

Determine your event date. Think about your target audience – what else will they be doing? Avoid choosing a date that will conflict with popular campus events such as Storm the Wall, or that will conflict with the academic schedule.

Develop a budget. Your budget should be feasible. Include expenses, anticipated revenue, sponsorship, and any donations in kind. The event budget should be approved by the sponsoring organization.

Estimate your attendance. Be realistic. Consider minimum attendance required for the event to run, maximum event capacity, and try to use past event attendance to project your numbers.

Choose a facility based on your budget, projected attendance, and space requirements.

Marketing campaign

Develop a marketing strategy. Will your event have a theme? If so, how will it be incorporated into your marketing efforts?

Create a visual image (logo, colours, text styles, images, etc.) and stick with it. A consistent message throughout your promo material will help your event stand out.

Draft posters, handbills, banners, etc. and have the designers bring them back to the planning team for review and input.

Contact printing companies, if applicable, to get quotes on poster printing costs.

Keep the event website up-to-date with information about your event.

Human resources

Check in with all members of the planning team. Does everyone understand his/her role and responsibilities within the team?

Set up a meeting/planning schedule with those involved in the event.

Do all team members know where, when, and why you'll meet? Send out a meeting schedule or planning timeline.

Incorporate some team building into your first few meetings.

Circulate a contact list (name, responsibilities, email, phone, etc.) to all planning team members.

Ensure that all planning team members are informed about the commitment.

Guests (keynotes, bands, VIPs, etc.)

Book guests, performers, and keynotes. If you're inviting a speaker or entertainer to your event, the earlier you research and book, the better! Usually, you'll want to know your event date, theme, and venue before contacting a guest. Depending on how important the guest is to the functioning of your event (for example, the speaker at a lecture series!), you may need to let your guest's schedule determine your event date.

Request a quote from all guests you will need to contract. If a guest is not contracted, it's still a good idea to have the arrangement in writing to help avoid any miscommunication.

Six weeks before the event

Logistics

Finalize an event schedule. Start by breaking down the day into 15-minute segments and indicating who should be where, when. Your event schedule may change as the program comes together, but having a clear schedule is crucial to effectively plan for volunteers, speakers, caterers, etc.

Marketing campaign

- Ensure that marketing resources are ready.
- Develop a plan for distribution. You've created great posters—where and how will they be circulated? What are the best locations and times to distribute handbills?

Human resources

Revisit the goals for your event. Is your team moving toward these goals? If not, the process or the goals may need to be re-evaluated.

Check in regarding progress on assigned tasks and responsibilities. Does anyone on the planning team need help with his/her assigned tasks?

One month before the event

Marketing campaign

Implement your promotions campaign. Get the word out! Now is the time to distribute your promotions.

Schedule volunteers to sell tickets, hand out flyers, and staff information booths in high traffic locations like the SUB or your faculty building. Be sure to check with SAC, the dean's office, or the appropriate building administration to book time and verify promotion rules.

Classroom announcements can be very successful at UBC. A quick way to do this is to ask members of your club or committee to make an announcement in each of their classes. Be sure that your announcers know to get the permission of the instructor first.

Licensed events

If you're having a licensed event at the University, you need to obtain a Special Occasion Permit and a liquor license from the RCMP. Before the RCMP will issue a permit, you need to have permission from the University. Contact Classroom Services to arrange an appointment to discuss your event.

Catering

Contact catering companies. Check with your venue to see if they have required or preferred caterers.

Consider dietary needs. Will you have a selection of alternative options for dietary needs (vegan, vegetarian, lactose-free, etc.)?

Two weeks before the event

Logistics

Confirm venue, catering, keynote speakers, guests, bands, the dj, or any other service or individual you've contracted.

Check to ensure that you have enough help. Are all the volunteer roles covered? Have you allocated enough help for each task? As the organizer, it's usually a good idea to leave yourself out of the task list as much as possible.

Week of the event

- Prepare event signage.
- Make volunteer thank-you cards or gifts.
- Purchase supplies needed for the event (snacks, nametags, decorations, etc.).
- Review the event schedule and volunteer schedule and circulate this information.
- Arrange any necessary training for your volunteers (handling cash for ticket sales, dealing poker for a Casino Night, etc.).

Day before the event

- Have a brief check-in meeting with the key event planners. Review the event plan/schedule and ensure that all members have the resources they need.
- Leave time to pick up time-sensitive or perishable supplies, guests from the airport, etc.

Day of the event

- Arrive early. Double check that tables, chairs, A/V equipment, food, signage, etc. are as required.
- Decorate and/or put up signs and directional information.
- Clean up – it's one of the toughest parts of scheduling an event, but one of the most important if you're hoping to use a venue again in the future! Ensure you've scheduled plenty of volunteers to help with clean up.

After the event

- Plan a volunteer or planning team thank you (dinner, small gift, card, etc.).
- Plan a wrap-up meeting. As a planning team, discuss successes, challenges, and recommendations for the future. If you evaluated your event formally in any way (surveys, etc.), this information should also be considered.
- Reconcile the budget and present an overall event budget back to your club or organization.
- Prepare a report or group evaluation for use by future event organizers! This report should include:
 - Recap of the event (who, what, where, when, why)
 - Evaluation comments
 - Recommendations for future
 - Contact information for services/resources that were used
 - Final budget
 - An attached file containing sample promotions, task lists, photos

For more information, contact us:

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