

Event Planning Checklist

Checklist Items	Yes	No	Not Required	Comments	Point Person
AS EARLY AS POSSIBLE					
Coordinate dates and secure speakers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Submit a space reservation request (Spaces for the main event, registration, reception, green room, alternative viewing locations, break-out sessions, etc., as needed)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Touch base with the Office of Special Events Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Establish clear goals, audiences, and objectives – What does success look like for this event?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Request bio & photo of the speaker(s) and share with the Office of Communications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Design invitation <i>Tips for invite:</i> <ul style="list-style-type: none"> • <i>Contact Creative Services, who can provide you with templates and Montgomery College-branded headers</i> • <i>Include speakers, topic, date, time, location, link to RSVP, hosts/sponsors</i> • <i>Include photos (if possible)</i> • <i>Consider including language:</i> <i>“RSVPs are required.”</i> <i>“Seating is limited and available on a first-come, first-served basis.”</i> <ul style="list-style-type: none"> • <i>Include information about dietary restrictions (if applicable)</i> • <i>Include info about social media (i.e., Twitter handle and hashtag), if applicable</i> 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

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Develop an online RSVP page with <i>RSVPify</i> (contact the Office of Special Events for assistance) <i>Tips for RSVP page</i> <ul style="list-style-type: none"> • <i>Pertinent event information</i> • <i>Include First Name, Last Name, and E-Mail</i> • <i>Any details you want to highlight for your guests</i> 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Determine the budget for the event and who is paying <i>*Be sure to consider additional costs for staffing and overtime</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Evaluate room capacity and discuss the target # for RSVPs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
6-8 WEEKS BEFORE EVENT					
Post-event info on the College website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Determine whether or not the press will be invited to your event. Work with Media Relations to develop a PR strategy and conduct media outreach (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Distribute invitations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Conduct a test of your invitation with multiple reviewers before sending it. Check all links, photos, and content.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Monitor RSVPs closely	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Secure Montgomery College representative to handle introductions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Submit catering and room set-up requests with METZ and the Office of Facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Submit a request for A/V support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Request photographer support through the Office of Communications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

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<p>Please a request for MCTV (if your event requires recording and live webcast)</p> <p><i>Note: Per MC guidelines, all online materials must be ADA-compliant, including videos. Please ensure video captioning with your video source and test it before posting videos publicly.</i></p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Assign a rehearsal session for anyone who has a speaking slot					
<p>Send speakers a photo and video consent and release form</p> <p>Please contact the Office of Communications for the form</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Work with the Office of Communications to design programs (if needed)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Order branding material, decorations, and flowers (if needed)					
Obtain gift(s) for speaker(s), if applicable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
4 WEEKS BEFORE EVENT					
Send out invitation reminder #2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Coordinate a planning meeting with speakers and event contacts to discuss run-of-show, objectives, format, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Work with the Office of Communication to promote your event on the digital signage at Montgomery College:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Montgomery College is committed to providing equal access to events for persons with disabilities. Contact the Office of Disability Support Services for assistance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Contact the Print Production Coordinator to request signage (event details, directional, parking, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

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Notify the Office of Public Safety to request reserve parking and if you have special security needs and/or your event features a high-profile speaker.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2 WEEKS BEFORE EVENT					
Send out invitation reminder #3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Evaluate RSVPs – do you need to cast a wider net or consider changing rooms?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Print programs (if needed)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Send event briefing to speakers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Prepare a program script for the event	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Approve/adjust the catering menu (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
1 WEEK BEFORE EVENT					
Schedule a planning meeting to confirm all details against the Master Plan You should also ensure backup plans are developed for any situation (e.g., backup volunteers as VIP greeters, additional volunteers for registration or setup, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Finalize event script	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Brief any/all hosts, greeters, and volunteers about their event duties and timelines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Finalize your seating plan, room setup, and AV needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Ensure it includes ADA-accessible areas and has clear paths through the venue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Provide a final registration number to the caterer Do a final registration check, including name badges & registration list. Depending on when your registration closes, this may not be possible until a few days in advance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Determine photo op list and interview opportunities with any presenters and VIPs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Send out invitation reminder #4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Print and organize name tag (if needed)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

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Send the Office of Alumni Relations a list of alumni who RSVP'd (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Coordinate staffing for registration, ushering, mic passers for audience Q&A, set-up, VIP greeting, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Touch base with the Office of Special Events, Communications, Facilities, and Metz to confirm event details (RSVP numbers, catering count, room set-up, photography, AV needs, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Print signs for the registration desk and VIP reserved seats (as needed)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Send a security list of external guests in hierarchy/alpha order to the Office of Public Safety	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

DAY OF EVENT					
Ensure all signage is in place both around the venue and any other areas in which it's needed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Ensure registration tables are prepared Stock with necessary items (such as blank name badges, paper, pens, tape, stapler, sharpie, scissors, etc.) Ensure there are enough outlets. If not, consider bringing power bars for attendees and your team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Ensure all MC swags, gifts, plaques, trophies, etc. are on-site	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Ensure all A/V equipment is setup and working properly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Send out event reminders to guests who RSVP'd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Check that greeters and VIP escorts are in place	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Be prepared to troubleshoot on-site	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Check event space set-up at least one hour before start time. Please note the temperature and cleanliness of the room.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Bring speaker gift to event space (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

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Set out bottled water for speakers in the event space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Place reserved signs in front rows for VIP seats	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Print copies of the RSVP list for the registration table	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Get signatures from speakers on photo/video release if you did not get this in advance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Close the online registration page	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
POST-EVENT					
Debrief with your team to discuss event successes and areas for improvement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Write and send thank you notes to speakers and volunteers/staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Share photos, video, and signed release forms with the Office of Communications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Save the final attendee list and share it with Development and the Alumni Relations team. Add final attendee #s, as compared to # of RSVPs to record the event KPIs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Send out a post-event survey. Record responses for event metrics.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		