

SANTA CLARA UNIVERSITY

Event Planning Checklist

Event Name: _____ Event Date: _____

Organizer: _____ Location: _____

Estimated Attendance: _____

Event Timeline:

Budget:

Printed Materials:

Invitations

Design/Production: _____

Send Date: _____

Programs

Design/Production: _____

Completion Date: _____

Menu Cards

Design/Production: _____

Other

Design/Production: _____

Catering

Menu Notes:

Caterer Name: _____ Contact: _____

Décor /Florist

Linens: _____ Contact: _____

Delivery/Pickup

Date: _____ Time: _____ Location: _____

Florist: _____ Contact: _____

Delivery/Pickup

Date: _____ Time: _____ Location: _____

Audio Visual:

Microphone(s): _____ Speaker(s): _____ Monitor(s): _____ Projector: _____

Other: _____

Rentals:

Rental Company Name: _____

Contact: _____ **Phone:** _____

Tables: _____ Chairs: _____ Linens: _____

Other: _____

8 Weeks Out

- Assign event manager within your department
- Determine estimated attendance goal/capacity
- Schedule space on Ad-Astra or through appropriate building manager
- Confirm location, date, and time of event
- Calculate event revenue and expenses
- Provide parking options
- Confirm speakers/special guests
- Secure sponsorship
- Design invitations
- Create event on CLARA (for event tracking on University Alumni/Donor database)
- Other _____

4-6 Weeks Out

- Check with staff members or event committee to confirm priorities and budget are on track
- Collect and share bios of speakers
- Notify Transportation Services of parking needs
- Secure photographer
- Secure event staff

- Secure student event staff
- Mail invitations
- Contact Bon Appetit or Adobe Lodge for to complete catering needs and menu planning

Month of Event

- Order Facilities equipment
- Order rental equipment
- Order media/AV equipment
- Order floral arrangements/plants
- Plan method for distributing tickets to guests
- Determine event agenda/program with remarks and speaking times
- Review event agenda with staff members, speakers, chapter leaders, etc.

Week of Event

- Determine seating arrangement for guests
- Send campus VIPs event seating chart
- Verbally review talking points, upcoming events and benefit of the month with staff member
- Print registration check-in sheet and nametags

Day of Event

Plan on early arrival to set up and walk through with venue manager or host.

- Ensure setup is complete
- Alert venue staff to direct guests to event space
- Set up check-in table with list and nametags at entrance of venue
- Ensure Santa Clara signage and banners are visible throughout event space
- Arrange AV equipment and sound check
- Set up any decorations or centerpieces
- Have digital camera for event photos

Week Following Event

Complete post-event follow-up no later than 1 week after event

- Send thank-you emails to attendees
- Send thank-you note to sponsor(s)
- Submit Post-Event Report to staff/committee
- Photos to post online
- Update actual attendance list (remove no shows, etc)
- Manage expenses on Concur or through Peoplesoft
- Send gift cards to volunteers
- Other _____