

# WEBSTER UNIVERSITY

## SPECIAL EVENT PLANNING CHECKLIST

### For University Departments

Ideally, special events are planned 6 months or more in advance. Unfortunately and often, event planners have less time to plan and implement a thoroughly executed event. Even if your event is in two months or two years, this event planning checklist can provide a written record of all the necessary components for success.

#### Getting Started

Date Completed	Person Responsible
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_____	_____	From the very beginning, put everything in writing. The Special Events Website has many sample forms to help you get organized, including a Budget and Planning Guide, Evaluation, and Sample Agendas.
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_____	_____	Determine the purpose and goals for the event.
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_____	_____	Identify a theme.
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_____	_____	Check on desired dates by contacting Marianne Kirk at <a href="mailto:kirkma@webster.edu">kirkma@webster.edu</a> or 314-968-7456 in the University Communications department to avoid scheduling conflicts with other University events.
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_____	_____	Determine the overall budget for the event and allocations for various portions of the event.
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_____	_____	Identify and invite all speakers/entertainers involved in the event. Put all agreements and details for any speaker or entertainer in writing in the form of a letter of agreement or a contract.
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_____	_____	Reserve space for the event through the appropriate University Office. Check out the Special Events Website for contact information.
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_____	_____	Who on campus is going to be involved in your event? For instance, will the President make opening remarks? Make sure you get the date on the calendar of all key participants.
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_____	_____	Once you've selected a date, time and location, complete the Master Calendar Activity Notice or contact Marianne Kirk, <a href="mailto:kirkma@webster.edu">kirkma@webster.edu</a> or ext. 7456, to get the event placed on the University's on-line Master Events Calendar.
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_____	_____	Who are you inviting to your event? Students, faculty, staff, trustees, donors, alumni, targeted guests, and/or the general public? Write a plan to promote the event, including who you want to reach and the various methods you will use. Contact University Communications at 314-968-7456 for help.
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**On campus Publicity**

Date Completed      Person Responsible

\_\_\_\_\_      \_\_\_\_\_      Identify other departments who may have similar or related interests. Invite them to co-sponsor the event or help with audience building.

\_\_\_\_\_      \_\_\_\_\_      Are you sending invitations or registration materials for your event? Develop a mailing list (names, addresses, phone/e-mail) of the desired guests/audience. Start this process early, because invitations should be sent no later than 6 weeks prior to the event. If you have ample time, consider sending a 'hold the date' card 4-6 months prior to the event.

\_\_\_\_\_      \_\_\_\_\_      Consider alumni of your school or college (the Alumni Office can help, but you'll pay for your own mailing). Contact Mary Krchma, mkrchma@webster.edu or ext. 7141, for information.

\_\_\_\_\_      \_\_\_\_\_      Is it appropriate to invite trustees or donors? Talk with Development about possibilities. Call Kathie Ayers, ayerskc@webster.edu or ext. 7148, who will direct you to the appropriate Development Officer.

\_\_\_\_\_      \_\_\_\_\_      When thinking about general print promotion, start by thinking about a poster. Write copy for all printed materials you will use to build an audience for your event – your poster first, then invitations, response cards, flyers, brochures, press releases or public service announcements. Be sure to include a map and parking information, highlighting parking for disabled persons.

\_\_\_\_\_      \_\_\_\_\_      Determine the total number of invitations to be printed and/or the number of posters/flyers need to reach your desired audience.

\_\_\_\_\_      \_\_\_\_\_      Give the final copy to a designer or printer with written instructions about desired look, budget, quantity and due date. Contact graphic designer Laura Thake, lthake@webster.edu or ext. 7602, for help.

\_\_\_\_\_      \_\_\_\_\_      Hang posters on campus anywhere there's a 'generic' bulletin board, and don't forget the residence halls and apartments. The University Center staff hangs posters in the UC and Sverdrup display cases - send them six.

\_\_\_\_\_      \_\_\_\_\_      Flyers can be sent via campus mail to on-campus students, faculty and staff. Check with the mail center for faculty and staff numbers. Send 200 to Residential Life and 300 to the Apartments for student distribution. (Editor's note - we suspect that sending flyers to apartment mailboxes is a waste of paper. Campus mail goes to boxes that are separate from US Postal Service boxes, so students have little incentive to check them. Your call.)

**On campus Publicity (continued)**

Date Completed      Person Responsible

\_\_\_\_\_      \_\_\_\_\_      Perhaps a better use of flyers is ‘targeted’ distribution. Flyers can be distributed to all student organizations - send 50 flyers to the University Center and ask that they be put in organizational boxes. You can also send flyers to all the RAs and CAs. Include Student Affairs staff in your distribution.

\_\_\_\_\_      \_\_\_\_\_      And how about table ‘tents’ in the cafeteria and Blimpies?

\_\_\_\_\_      \_\_\_\_\_      Sidewalk chalk ‘ads’ along well-traveled routes? Other creative ideas (banners, premiums, etc.)?

\_\_\_\_\_      \_\_\_\_\_      Do you have a decent advertising budget? Consider **The Journal**; you can choose either a traditional ad or a flyer insert. Call ext. 7538 for a deadline schedule and cost information.

\_\_\_\_\_      \_\_\_\_\_      Flyers stuffed under car windshield wipers? Note: this is decidedly unpopular with Public Safety and Facilities Management, so ask permission first.

\_\_\_\_\_      \_\_\_\_\_      And whenever you can, get students involved in planning and implementing your event. Their word-of-mouth is the best form of publicity.

As appropriate, utilize other on-campus promotional tools, including:

\_\_\_\_\_      \_\_\_\_\_      **Inside Webster.** Marianne Kirk, kirkma@webster.edu.

\_\_\_\_\_      \_\_\_\_\_      **Gorlok Online Calendar.** University Center, ext. 7105.

\_\_\_\_\_      \_\_\_\_\_      **The Journal**, call ext. 7538 or <http://www.webujournal.com/>

\_\_\_\_\_      \_\_\_\_\_      **Media Bulletin**, the School of Communication (ext. 7154) newsletter.

\_\_\_\_\_      \_\_\_\_\_      KGLX, the campus radio station.

\_\_\_\_\_      \_\_\_\_\_      School of Business & Technology newsletter. Contact Charla Lord, charlalord90@webster.edu

## Off campus Publicity

Date	Person
Completed	Responsible

		If you're planning your event well in advance, you may also consider community partnerships – are there civic organizations that might be interested in sponsoring your program? Contact colleagues, Development, or the Career Center (ext. 6982) for ideas.
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		Is the general public invited? Contact the Media Relations coordinator for your school who will prepare a press release to send to local media, calendar sections, and <b>The Journal</b> . Your Media Relations coordinator can also advise you on the potential for post-event coverage. Contact Polly Harbaugh, harbaupo@webster.edu or ext. 6954, for additional information.
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		Another way to spread the word outside of Webster is to hang posters around town. You can do it yourself or hire a company to do it for you. Contact University Communications, extensions 7916 or 7456, for information.
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		Maybe a formal partnership is unnecessary, but you'd still like to tell other community groups about your event so they can tell their members. Think about sending invitations to civic groups, professional associations, other universities and schools, non-profits, and other niches that might be interested in your topic. Whenever possible, it is more effective to direct an invitation to a specific person rather than a department or company.
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		Do attendees pay for or register for your event? Think through this process carefully, including:
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- Creating an invitee database, if applicable
- Ticketing – is there a one price or a pricing structure for early registrants, meal plans, etc.?
- Payment process – including receipts, making change, payment method
- Can your attendees register on-line?
- Registration confirmation process (think simple, think e-mail)
- Creating an attendee database as you go
- Registration packets (for the day of the event) – include campus maps!
- On-site registration (again, for the day of the event)

## Set Up

Date Completed	Person Responsible
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| _____ | _____ | Meet with in-house or outside catering representatives to select food and beverages within food budget. Make arrangements for delivery, set up, service and clean up of food and beverages.  |
| _____ | _____ | Write and submit all necessary purchase orders one month in advance.   |
| _____ | _____ | Fill out a Facilities Operations work order for any special cleaning, moving of equipment or furniture, arranging for a podium, or trash removal that may be necessary as the result of the event. Call ext. 6904 to request a work order form, and process the work order as early as possible. If the event poses unusual set up requirements, contact Jim Ward, wardji@webster.edu or ext. 7597, to discuss arrangements. |
| _____ | _____ | Notify Public Safety, public-safety@webster.edu or ext. 7430, of the event a month in advance, and make arrangements with that department for any special security needs, reserved parking or to accommodate special parking or handicap access needs.   |
| _____ | _____ | Make arrangements early with a photographer, including day, arrival time, type of photos wanted, fees and expected delivery date of photos. Call Claudia Burris, burriscl@webster.edu or ext. 6958, in University Communications for recommended photographers. She's also the editor of <b>Webster World</b> , and may have interest in your event for inclusion in the magazine.   |
| _____ | _____ | Complete program schedule, including topics, speakers, times, and room(s). Mail schedule to all participants 2 weeks in advance.   |
| _____ | _____ | Review committee member, volunteer or staffing assignments to insure a clear understanding of the responsibilities of everyone involved with the event.  |
| _____ | _____ | Make any directional signs necessary to indicate parking lots and event location(s).   |

### Program Preparation

Date Completed	Person Responsible
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| _____ | _____ | If you want to audio or video record the event, you must get permission from the speaker(s).  |
| _____ | _____ | Make hotel reservations or arrange for housing for the speaker.   |
| _____ | _____ | Plan for transportation and meals for the speaker, too.   |
| _____ | _____ | Check with speaker(s) about any special needs for the presentation. Make AV arrangements through the facility coordinator, but remember, there may be additional costs. |
| _____ | _____ | Does the speaker incorporate printed materials (handouts), and do you want a printed program or attendee evaluation forms?  |

### Event Day

Date Completed	Person Responsible
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| _____ | _____      | Check the location set up, i.e. chair arrangements, podium, head table, food service set up, to be sure it is the way you expect it. |
| _____ | _____      | Have all printed materials for the event delivered to event location.  |
| _____ | _____      | Set up registration table, if used, for registration materials, typed name tags, blank name tags, pens, etc.                         |
| _____ | _____      | Put a glass of water at the podium for speaker(s).   |
| _____ | _____      | Check on all microphones, lighting, electrical connections, sound system adjustments and video or slide equipment.                   |
| _____ | _____      | Arrive at the event at least one hour early to double-check everything.  |
| _____ | <b>ALL</b> | Enjoy the event!   |

## Wrap Up

Date Completed	Person Responsible
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_____	_____	Complete a written evaluation of the event, with suggestions for future events. Compile attendee evaluation forms, if applicable.
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_____	_____	Write thank you notes to participants, volunteers, staff and others as appropriate.
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Submit your event story and photographs to the appropriate Webster publications:

_____	_____	<b>Inside Webster</b> , the on-line employee newsletter of Webster University. Contact Marianne Kirk at <a href="mailto:kirkma@webster.edu">kirkma@webster.edu</a> .
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_____	_____	The School of Communications newsletter <b>SCAN</b> . Call ext. 7154.
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_____	_____	The School of Business & Technology e-newsletter, <b>Nota Bene</b> . Contact Charla Lord at <a href="mailto:charlalord90@webster.edu">charlalord90@webster.edu</a> or ext. 7871 for information.
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_____	_____	<b>Webster World</b> , call Claudia Burris at <a href="mailto:burrisc@webster.edu">burrisc@webster.edu</a> or ext. 6958.
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_____	_____	<b>The Journal</b> , call ext. 7538 or <a href="http://www.webujournal.com/">http://www.webujournal.com/</a>
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_____	_____	Also, work with your Media Relations coordinator to send photos of the event and a press release to your local media, as appropriate.
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