Chronological Event Planning Checklist

Student Involvement and Leadership • getinvolved.wustl.edu

Name of Event: ____________________________  Brief Description: ____________________________

Date of Event: _______________   Time: ____________ am/pm to ___________ am/pm  Location: ______________________________________

Open to Non-WU Community: Yes ______  No ______  Attendance: _______________  Overall Cost: __________________

Alcohol Served: Yes _____  No _____  Outside Noise Amplification? YES times: _____ am/pm to _____am/pm  NO

Sponsoring Organizations: ____________________________________________  Today’s Date: _______________

Beginning of Semester

Tasks to Accomplish

At least 2 members of your organization will need to attend an alcohol training workshop in order to have alcohol at any events

Publicity

List your event in the student planner (must happen in the spring of the year previous)

6 Weeks or MORE Before Event

Initial Planning Steps

Meet with Student Organization Advisor
Select ideal date, time, and location for the event and check events calendar at spark.wustl.edu
Review appropriate university policies (i.e. alcohol, city ordinances)

Budget

Assess your budget and decide amount to allot for event
Figure out ways to fundraise if budget not sufficient (includes donations, SU, etc.)
Explore co-sponsorships with other student organizations

Contacts or Arrangements to Make

Contact artists and performers you are considering for your event
Choose the performer you would like, acquire a contract, rider, and technical rider for their performance, as well as discuss any extra services you would like them to provide such as interviews with media groups, meet and greets, etc.
Discuss the rider with performer and determine what hospitality items you will need
Discuss the terms of merchandise sales (who sells, how profits will be divided)
Recruit event staff and assign duties

4 Weeks or More Before Event

Space Reservations

Reserve the space(s) you want for your event (including hospitality rooms) through Event Services, Residential Life, or appropriate academic building/off-campus location, as well as any spaces you might need for publicity (underpass, Oak Walk, dining locations, Mallinckrodt and Wohl tables)

Meet with department heads to reserve any non-common space you need

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4 Weeks or More Continued

**Contacts or Arrangements to Make**
- Inform WUPD of the time/date, location, event, and if it will exceed 50 participants or serve alcohol
- Contact B & D Security for an event larger than 50, an event with talent, or an event with alcohol
- Decide what types of services you need for your event and contact Aramark, Top Care, Maintenance, Bon Appetit, on-campus equipment providers, outside vendors, as appropriate (a list of preferred vendors can be acquired in the Student Union office or in SIL). Collect price quotes.
- Decide what type of sound, lighting, staging, projectors, etc may be needed
- Contact Media Services (x 7427) or outside vendor if not available
- Contact Student Involvement and Leadership (SIL) and fill out proper paperwork for events with alcohol, event registration, contracts, etc.
- Arrange for transportation and hotel if needed
- Set the performance time, or schedule if there is more than one performer
- Reserve a location for hospitality of performer (this may be a dressing room)
- Assign responsible contacts for event

**Tasks to Accomplish**
- Review contract, make any noticeable changes to the agreement you made with contractor
- Design any items you might need such as fundraising items, graphics, decorations, banners, t-shirts, etc.
- Order any items that will need to be shipped or processed such as t-shirts, stickers, prizes, etc.
- Reserve a space to sell items (if needed)
- If needed, print up tickets for your event
- Reserve a space to sell tickets

**Publicity**
- Ask for a press packet to promote event, update the website, register the event on Spark, word of mouth, print t-shirts (either professionally or via iron-ons)

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10 Days or MORE Before Event

**Contracts and Payments**
- Give copy of contract to SIL and sign-up for a time to meet with a staff member
- Meet with SIL Staff Member and pick-up signed contract
- Submit a financial request for each vendor/performer/speaker/food service provider, etc.
- (purchase order with contract to funding source (Student Union Business Manager)
- Mail contract back to vendor and keep a signed copy for your student group files
- Pick-up check from files near Student Union business manager’s office
- Notify each contractor of their purchase order number or give performer/vendor/artist check upon receipt of services (Document on Vendor and Services Detail form)
- Fill out and turn in expense report for student group services
- Purchase hospitality items and other supplies needed (tape, markers, etc.)
- Order Wristbands from SIL for event

**Confirmations**
- Schedule when you will sell tickets or fundraising items and who will sell at what times
- Confirm all services are contracted and planning to attend
- Arrange and confirm delivery and pick-up times and locations with each vendor or student groups providing services
- Arrange for a meeting time with performer/artist (will this be on campus, do you need to pick them up at hotel, etc.)
- Confirm performance time and other logistics with the talent; Mail contract back to vendor
- Make Contact List and Staffing Schedule

**Publicity**
- Post flyers and put in res. hall mailboxes, table in Mallinckrodt and Wohl, send press releases to student media groups, send email blast reminders, list event on campus events calendars such as Red Alert and The Link, take out a Facebook announcement, word of mouth
Week of Event or Before

**Tasks to Accomplish**
- Order wristbands for event through SIL.
- Purchase hospitality items (follow refreshment requirements on contract rider if applicable).
- Pick-up a cash box
- Make chart to track sales
- Pick-up any keys/confirm card access to anywhere you will need to access (Event Services)
- Sell your items and deliver them to purchasers if applicable

**Arrangements to Make**
- Meet the vendor to make sure arrangements are in order
- Arrange a meeting with Washington University Police Department (WUPD), SIL, and other vendors, as appropriate to go over event plans and security needs.

**Publicity**
- Paint the Underpass, hang banners in Mallinckrodt, Wohl, or Oak Walk (Bring to Event Services on Tuesday before 5pm)
- Place table tents in dining locations (After approval)

**2 Days Before Event**

**Tasks to Accomplish**
- Make a schedule of expected deliveries that includes a list of contact numbers in case there are problems (May use SIL Vendor and Services Details form).
- Make a staffing schedule and contact list
- Pick-up wristbands
- Purchase necessary supplies (tape, markers, napkins, plates, nametags, etc.)

**Day of Event**

**Tasks to Accomplish**
- Put hospitality items in greenroom or hospitality location
- Meet with someone from each service provider to go over what you want them to do
- Meet vendors to make sure plans are in order
- Meet vendor to make sure everything is set-up and taken down properly
- Work with sound, light, and staging crews to make sure set-up is smooth
- Meet performer/artist in advance of show to make sure everything is in order
- Meet your deliveries
- Brief your staff and security about how the event will go and what to expect
- Set-up your event area, including various entrances if required (including wristbands)
- Post signs directing people to your event, to restrooms, and other necessary points
- Clean-up

**As Soon After the Event as Possible**

- Return any keys or cards, as well as anything borrowed or rented
- Fill out and turn in expense reports if renting a space with a fee
- Fill out an expense report and give Edison Theatre a PO for ticket revenues
- Confirm that everyone has been paid (artists, vendors, etc.)
- Deposit any fundraised money into your student group account
- Write an evaluation of the event for future reference
- Organize your records
- Send Thank You cards as appropriate
- If event had alcohol, meet with a SIL advisor to complete the mandatory debriefing meeting