



## UBCO Event Planning Checklist

This is a guide to help you plan your event on campus.

### Contacts:

Event Coordinator: \_\_\_\_\_

Host: \_\_\_\_\_

Originator/Department: \_\_\_\_\_

### Basic Planning Elements:

Name of Event: \_\_\_\_\_

Event Date(s) and Time(s): \_\_\_\_\_

Location/Venue: \_\_\_\_\_

Budget Amount: \_\_\_\_\_ Drafted: \_\_\_\_\_

Speed Chart: \_\_\_\_\_ Accounts (identify account usage): \_\_\_\_\_

Budget Contact: \_\_\_\_\_

Purpose of Event: \_\_\_\_\_

Type of Event:  Event  Meeting  Workshop  Conference

Target Audience: \_\_\_\_\_

Number of Anticipated Guests: \_\_\_\_\_

Invitee Authorization Form Required? \_\_\_\_\_ Prepared? \_\_\_\_\_

### Planning Team and Volunteers:

Planning Committee Members: \_\_\_\_\_

Volunteer Coordinator: \_\_\_\_\_ Required # of Volunteers: \_\_\_\_\_

Review Checklists  Yes  No Comments: \_\_\_\_\_

Assign Responsibilities and Timelines:  Yes  No Comments: \_\_\_\_\_

### Venue:

Venue Selected:  Yes  No Name: \_\_\_\_\_ Date Confirmed: \_\_\_\_\_

Set Up & Tear Down Time Required:  Yes  No Time Required: \_\_\_\_\_

Time Venue Booked For: \_\_\_\_\_

Campus Security Form Required?  Yes  No Submitted:  Yes  No

Approved:  Yes  No Comments: \_\_\_\_\_

Tenting Required:  Yes  No Provider: \_\_\_\_\_

Rain/Poor Weather Contingency Plan:  Yes  No Details: \_\_\_\_\_



# Conferences & Accommodation

Okanagan Campus

### Registration, Invitation, Guest List:

Registration Required:  Yes  No Set Up Completed:  Yes  No Deadline: \_\_\_\_\_ Early Bird \_\_\_\_\_ Regular

Invitation/Save the Date Required?  Yes  No

Print or Email Invitations: \_\_\_\_\_ Date Sent by: \_\_\_\_\_

Guest List Provided by: \_\_\_\_\_ Deadline for list: \_\_\_\_\_

Individual Invite or with Guest:  Individual  with Guest Comments: \_\_\_\_\_

Parking Pass or Map needed:  Yes  No Comments: \_\_\_\_\_

RSVP Contact: \_\_\_\_\_ RSVP Deadline: \_\_\_\_\_

### Marketing/Communication:

Communications Webform:  Yes  No Date Submitted: \_\_\_\_\_

Client Marketing Plan Created:  Yes  No Comments: \_\_\_\_\_

Invitation/Save the Date Drafted/Designed:  Yes  No Comments: \_\_\_\_\_

Invitation/Save the Date sent Date: \_\_\_\_\_ Sent to:  Delegates  Students  Staff  Faculty

Material for Website:  Yes  No Date Submitted: \_\_\_\_\_

- Info Submitted:  Info Page  Registration Form  Schedule  Map  Other: \_\_\_\_\_

Internal Communications:  Yes  No Date Submitted: \_\_\_\_\_

- Info Submitted:  Exchange  TVs  Electronic Sign  Events Page  Campus Online Calendars

External/Off Campus Communications:  Yes  No Date Submitted: \_\_\_\_\_

- Info Submitted:  Press Release  Yes  No Comments: \_\_\_\_\_
  - Castanet Events Page  Yes  No Comments: \_\_\_\_\_
  - Blog/Social Media  Yes  No Comments: \_\_\_\_\_
  - Poster Distribution  Yes  No Comments: \_\_\_\_\_
  - Event Signage  Yes  No Comments: \_\_\_\_\_
  - UBCO.tv Invitation  Yes  No Comments: \_\_\_\_\_

Photography Required at Event:  Yes  No Photographer: \_\_\_\_\_

### Marketing Deliverables:

Poster:  Yes  No Date Due/Comments: \_\_\_\_\_

Web Icon:  Yes  No Date Due/Comments: \_\_\_\_\_

Logo/Emblem:  Yes  No Date Due/Comments: \_\_\_\_\_

.eps File:  Yes  No Date Due/Comments: \_\_\_\_\_

Program:  Yes  No Date Due/Comments: \_\_\_\_\_



# Conferences & Accommodation

Okanagan Campus

### Printed Programs/Handout/Giveaways/Awards:

Printed Program  Yes  No Comments: \_\_\_\_\_

Printed Program Content Provided By: \_\_\_\_\_ Due By: \_\_\_\_\_

Designed By: \_\_\_\_\_ Due By: \_\_\_\_\_

Printing By: \_\_\_\_\_ Due By: \_\_\_\_\_

Delivery By: \_\_\_\_\_ Due By: \_\_\_\_\_

Other Handouts:  Yes  No Date Due/Comments: \_\_\_\_\_

Giveaways:  Yes  No Details: \_\_\_\_\_ Source: \_\_\_\_\_

Budget: \_\_\_\_\_ Staff Responsible: \_\_\_\_\_ Delivery: \_\_\_\_\_

Awards:  Yes  No Details: \_\_\_\_\_ Source: \_\_\_\_\_

Budget: \_\_\_\_\_ Staff Responsible: \_\_\_\_\_ Delivery: \_\_\_\_\_

### Event Program Speeches:

Event Script Created:  Yes  No Shared:  Yes  No Comments: \_\_\_\_\_

Speaking Program:  Yes  No Comments: \_\_\_\_\_

Speakers/Roles Drafted:  Yes  No Confirmed:  Yes  No Comments: \_\_\_\_\_

Emcee: \_\_\_\_\_

Keynote Speaker: \_\_\_\_\_

Event Outline: Drafted  Yes  No Approved  Yes  No Circulated  Yes  No

Background Info/Speaking Notes for Emcee and Speakers:  Yes  No

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Food & Beverage:

Catering Required:  Yes  No Budget: \_\_\_\_\_

Catering Provider (Scholar's Catering or Other): \_\_\_\_\_

Catering Provider Contact: \_\_\_\_\_

Type of Catering Required:  Breakfast  Lunch  Dinner  Coffee Break  Reception  BBQ  Light Refreshments

Liquor to be Served:  Yes  No **If Liquor not provided by Scholar's Catering Liquor License Required.**

Security Special Event Form Submitted:  Yes  No Comments: \_\_\_\_\_

Liquor License Requested through Liquor Control Board:  Yes  No Comments: \_\_\_\_\_

Serve It Right Designated Person:  Yes  No Comments: \_\_\_\_\_

RSVP #'s/Nutritional Needs Due By: \_\_\_\_\_

Menu Quotes Received:  Yes  No Comments: \_\_\_\_\_

Rentals Required (Tables, Chairs, China, Glassware, Linens):  Yes  No Comments: \_\_\_\_\_

\_\_\_\_\_

Rental Provider: \_\_\_\_\_



# Conferences & Accommodation

Okanagan Campus

### General Set-Up:

Floor Plan/Map/Diagram Created:  Yes  No Comments: \_\_\_\_\_

Event Lay out Created:  Yes  No Comments: \_\_\_\_\_

    Welcome/ Registration Table Needed:  Yes  No

    Name Tags:  Yes  No

    Extra Landscaping/ Garbage or Recycling Bins Needed:  Yes  No

Seating Plan required:  Yes  No Plan Created:  Yes  No Comments: \_\_\_\_\_

Facilities Work Request Submitted:  Yes  No Date Submitted: \_\_\_\_\_ File #: \_\_\_\_\_

    Floor Plan w/ Set-Up Notes Attached:  Yes  No

PA System Needed:  Yes  No Comments: \_\_\_\_\_

Extra AV Needed:  TV  Laptop  Projector  Screens  Lighting  Web Cast  Other \_\_\_\_\_

    AV Pick Up Location/Details: \_\_\_\_\_

    Power Source: \_\_\_\_\_ Party Pack Required:  Yes  No

Music:  Yes  No Live Music:  Yes  No Special Playlist:  Yes  No Comments: \_\_\_\_\_

Décor:  Yes  No Source: \_\_\_\_\_ Details: \_\_\_\_\_

Security Arrangements:  Yes  No Comments: \_\_\_\_\_

Extra First Aide:  Yes  No Comments: \_\_\_\_\_

Parking Arrangements:  Yes  No Comments: \_\_\_\_\_

Transportation Arrangements:  Yes  No Comments: \_\_\_\_\_

Other Requirements: \_\_\_\_\_

### Supply Run:

Shopping List Created:  Yes  No Time/Date Determined: \_\_\_\_\_

Locations: \_\_\_\_\_

Receipts Collected and Tracked:  Yes  No Comments: \_\_\_\_\_

### Pre-Event Administration:

Guest List Printed:  Yes  No

Name Tags Printed & Prepared:  Yes  No Extra Name Tags:  Yes  No Comments: \_\_\_\_\_

Event Supplies Prepared:  Yes  No

Signage Prepared:  Yes  No Comments: \_\_\_\_\_

Contracts Printed:  Yes  No

External Supplier Contact Numbers Noted:  Yes  No Comments: \_\_\_\_\_

Cheque/Payment for Presenters:  Yes  No Comments: \_\_\_\_\_

Assessment Method Chosen:  Survey ( Online or  In Person)  Focus Group  Debrief Meeting

Other: \_\_\_\_\_  None

Target Group:  Volunteers  Staff  Partners  Attendees  Other \_\_\_\_\_

Assessment Materials Prepared:  Yes  No Comments: \_\_\_\_\_



# Conferences & Accommodation

Okanagan Campus

## Post-Event Administration:

Photos Received and Distributed as Necessary:  Yes  No Comments: \_\_\_\_\_

Assessment Results Compiled and Reviewed:  Yes  No Comments: \_\_\_\_\_

Assessment Results Forwarded to Appropriate People:  Yes  No Comments: \_\_\_\_\_

Debrief Meetings as Required:  Yes  No Comments: \_\_\_\_\_

Debrief Notes Prepared:  Yes  No Comments: \_\_\_\_\_

Invoices Received and Sent to Appropriate Departments:  Yes  No Comments: \_\_\_\_\_

Remove Posters and Signage:  Yes  No Comments: \_\_\_\_\_

Remove Info from Website:  Yes  No Comments: \_\_\_\_\_

Final Budget Completed:  Yes  No Comments: \_\_\_\_\_

Event File Finalized:  Yes  No Comments: \_\_\_\_\_

## Financial:

PCard/Visa Reconciled with Correct Speed Charts:  Yes  No Date Completed: \_\_\_\_\_

JV's Completed:  Yes  No JV Number(s): \_\_\_\_\_ Date Sent: \_\_\_\_\_

Qreqs Completed:  Yes  No Q Number: \_\_\_\_\_ Date Submitted: \_\_\_\_\_

Tracked in Spending Spreadsheets:  Yes  No Date Completed: \_\_\_\_\_

Any Follow Up Required:  Yes  No Comments: \_\_\_\_\_

\_\_\_\_\_