Event Planning Checklist

Think Through the Details & Minimize Potential Risks!

Use this basic checklist to assist your group in planning a successful event. Remember, we may not have all of the specifics that your event requires on this sheet, so brainstorm early to make sure everything gets covered!

Name of Event: ____________________________________________

Purpose/Objectives of the Event: ____________________________________________
___________________________________________________________________
_____________________________________________________________________

Date of Event: ____________________  Time(s): ____________________  Location: ____________________

Brainstorming

☐ Will the event work to accomplish stated objectives?
☐ Who is the audience(specifically) for participation in this event? (public, students only, faculty/staff, others)
☐ How many people will you need to make the event happen?
☐ Does the event serve a need previously not met on campus? (Or are other groups already doing this?)
☐ Do we have the resources (volunteers, budget, facilities, etc.) to make it happen?
☐ How will we pay performers, service providers, venue or for equipment up front?
☐ What is the anticipated attendance?
☐ What venues would work for the event?
☐ Have we reserved or put a hold on the venue we have in mind?
☐ Do we need to take any special precautions in order to keep our guests/participants safe?
☐ Are there any special permissions needed to hold this event (e.g. fundraisers involving community donors, events involving alcohol, etc.)
☐ Are there other events scheduled at the same time that will compete with the idea of this event or take away from our attendance?
☐ Will this event be perceived by the public at large as a positive reflection of our group?
☐ Have there been any previous issues, injuries or incidents as a result of this event in the past? If so, what do we need to change in order to prevent those this time?

Budgeting

Member(s) in charge:

☐ Completed budget planning sheet.
☐ Contacted event service providers for estimates.
☐ Reviewed Contracts for Red Flags
☐ Requested needed funds from BUC Fund or outside sources (see University Advancement guidelines for soliciting donations)
☐ Secured funds to pay deposits and other up-front costs (supplies, equipment, travel arrangements, etc.)
☐ If collecting participation or ticket fees, established a clear method for keeping track of sales/collection and receipts.

Event Planning

Member(s) in charge:

☐ Paperwork to reserve space has been submitted.
☐ Confirmation of reservations has been received.
☐ Performer/Service Provider has been contacted and confirmation of date received.
☐ Contracts have been reviewed, edited, signed and received back from performer or service provider.
☐ Technical (A-V) needs and set-up for event have been determined and communicated with facility.
☐ Security needs/concerns have been communicated with facility and/or Public Safety. Staff and security access/credentials have been determined.
☐ Dates and deadlines for member participation fees or tickets sales have been established and someone is in charge of overseeing these.
☐ Travel arrangements have been made (for group travel, performer travel and ground transport, etc.)

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Adapted from Middle Tennessee State University’s Complex Event Planning Checklist 2012
Meal/Catering arrangements have been made. On the ETSU campus, Aramark Dining Service has exclusive rights.

Plans are determined for taking care of participants with disabilities/ in need of special accommodations and/or VIP and Distinguished guests’ needs. *Seating should be set aside ahead of time to accommodate these needs.

A list of necessary supplies has been generated and members assigned to purchase supplies.

Volunteer assignments for the day-of event have been determined and communicated to all partners.

Capacity of event has been determined, and a plan for crowd control has been discussed. All parties (facility manager, security, volunteers) understand how this will work.

Risks associated with this event have been noted and precautions taken to minimize risks.

- Does the event/activity involve physical activity or require specific knowledge or skills?
- Will individuals with physical limitations be participating?
- What injuries might occur (even for those without physical limitations)?
- Are there supplies we can and should have available in case of injury?
- Should we collect emergency contact information from all participants?
- Should we ask all participants to sign a liability waiver?
- Do we need to hire security or notify public safety in advance of the event?
- Should we require group leaders or participants to attend training or hold special certifications (wilderness first aid, CPR, etc.)?
- Does the activity or event require special gear or equipment? Has that equipment been properly maintained? Do individuals need to be responsible for their own gear?
- Does the activity require extensive travel? Are drivers licensed, insured and unimpaired?

Volunteers/Members have been assigned to breakdown and clean up after the event.

Post-event evaluations are ready for distribution following the event.

Thank you notes are sent to appropriate parties following the event.

**Completing Forms**

Visit the Policies and Forms page of the SORC website at [www.etsu.edu/sorc](http://www.etsu.edu/sorc) to find the forms referenced here.

- University Advancement Fundraising Request (To solicit business or alumni donors)
- Bulletin Board and Display Case Reservation
- Sidewalk Chalk Permit Form
- Campus Digital Announcement Request
- Equipment Reservation Form
- Culp Center Reservation Form
- Cancel/Change Culp Request Form
- Notification for Student Organization Events with Alcohol
- Alcohol Vendor Statement of Responsibility
- Participation Information & Liability Waiver--Example
- Emergency Contact Form--Example

**Advertising**

Visit the Policies and Forms page of the SORC website at [www.etsu.edu/sorc](http://www.etsu.edu/sorc) to find the appropriate forms for permission to advertise in the ways referenced here.

- Posting/Flyers
- Bulletin Boards, Display Cases & Banners (University Center)
- Digital Marquees (Nicks, Dossett &University Center)
- Digital Bulletin Boards (University Center, Residence Life TV & Center for Physical Activity)
- Buc-Hub
- PlanIT ETSU & PlanIT Students
- Table Tents and/or Sidewalk Chalk
- Ad in the East Tennessean (If the event targets the general public, consider sending press releases to community news outlets too. Contact University Relations for assistance-- [univrel@etsu.edu](mailto:univrel@etsu.edu).)