

# Event Detailed Checklist

This checklist should be used in conjunction with an Event Planning Timetable. This is just the details of the steps that will help plan your event. Please see the rest of toolkit to further develop parts of this checklist.

## Scheduling (people to consider and confirm with while establishing a possible date)

* Host
* Speaker
* President (and spouse)
* Vice President(s)
* Deans
* School Chairs
* Chairman
* Faculty
* Key Staff
* Student Representative
* Location availability
* School/National calendars

# Invitations

* **Design**- remember this is your first impression of event

## Guest List

* + University Heads
  + Faculty/ Staff
  + Student representatives
  + Non-affiliates invitees
  + Make sure all deans, school chairs, and appropriate hierarchy is invited

## Invitation Medium

* + Formal printed
  + Email
  + Other

## For Person/Department issuing invitation

* + Method of response
  + Registration website or online form

## Receiving RSVPs

* + Who needs to be updated on RSVPs
  + When to cut off RSVP date
  + Information to gather from guests

**Event Location**

* Availability
* Site visit prior to booking
* Proximity to institute, guests
* Deposits/room fees
* Maximum capacity
* Catering or dining resources
* Handicap access
* Security
* Parking (valet/ample space, etc.)
* Coat check
* Green/prep room
* Layout/rentals needed

# Catering

## Facility resources

* + Floor plan

## Menu Logistics

* + Type of service
  + Special dietary needs
  + Alcohol policy
  + Meals for staff

**Event Publicity/ Marketing**

* + - Event Registration Site
    - Life@Wharton/Digital Marketing
    - DP Advertisements
    - Calendar listings/MyWharton
    - Paid advertisement (Facebook, Instagram, LinkedIn)
    - Email notifications (website)
    - Other

# Program Scheduling and Content

## Table/ Seating Assignments

* + - * Develop floor chart
      * Staff and Student seating

## Program Material

* + - * Printed program if using
      * Name tags
      * Place cards
      * Table Numbers (along with a master list for greeters to let guest know)
      * Handouts
      * Promotional Items

# Photographer

* + - Booking and confirmation
    - Photo request list
    - Videographer

# Audiovisual Equipment

* + - Determine A/V needs (be sure to check with presenters as to what they will need)
    - Review venue capabilities, hire tech consultant (internal to Wharton or external)

# Floral Needs

* + - Table arrangements, stage pieces

# Speakers

* Confirm speakers
* Gather speaker biography, digital assists
* Speaker topic (get outline or slides in advance)
* Speaker introduction
* Gift to thank speaker(s)
* Signed Wharton Media Release

**Supplementary Staffing (will need people to fill the following posts)**

* Registration
* Greeters/ Host
* Event set up and breakdown