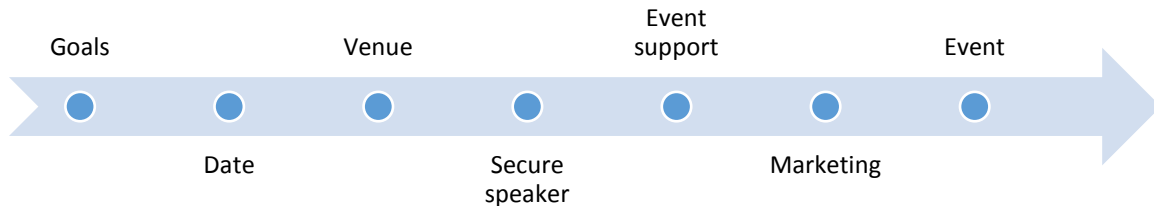


Event Planning Checklist

Wheaton College Scheduling Services

The larger the event, the more lead time is required to successfully host an event



Initial Planning: At least **3 - 12 months prior** to your event

- Define purpose and goal(s) of event.
- Determine that there is sufficient time to plan and execute this event.
- Appoint someone from your department who will manage this event and be in attendance**
- Determine budget and funding sources
- Are there other College Departments that will collaborate with this event?
 - Determine specific responsibilities of each department
- Check [Planning Calendar](#) for available dates
- Check [25Live](#) for available venue(s)
- Check availability of speakers, performers, or special guests
- Submit 25Live reservation request (be able to answer questions below)
 - Event Name
 - Expected Attendance
 - [Event Description](#)
 - Event Date(s) - alternative dates can be temporarily held until speaker availability is confirmed.
 - Event times
 - Additional time before/after the event
 - Location preference (first choice, alternative location and rain site, if needed)

[Do we want catering from Bon Appétit?](#)

[Do we need AV support from AIT?](#)

Do we need Facilities setup of the room or additional items delivered?

What account number will be charged for services?

Are we collaborating with an external organization?

Who is the external organization?

What is the College's relationship to the external organization?

What will be the responsibilities of the external organization?

What Staff person is responsible for this event?

Who is the intended audience? (external guests, faculty, staff, WC students)

Do we want to display this event on the [College Calendar](#)?

Do we want to display this event on the [Public Calendar](#)?

- If applicable, provide details requested by Event Coordination Council, address any concerns raised by the Council based on 25Live request.
- Receive event approval/confirmation from Scheduling Services based on 25Live request
- Confirm date with speaker, performer, and special guests **only after receiving confirmation from Scheduling Services or the location scheduler.**
- Obtain speaker/performer biography, event title and publicity photo.
- Contact MarCom for promotional plan and materials
 - Mailings
 - Brochures
 - Posters
 - Media outlets
 - Social media posts
 - Online calendar
 - Digital Signage files
 - Program

- Notify Purchasing if negotiating contracts with external vendors or agencies. Notify Conference Services if negotiating contracts with external co-sponsor of event.
- Issue purchase order in [ThunderMart](#) and attach contract.
- Determine if and how people will register, rsvp, buy tickets, etc.
- Set up on-line registration
- Are special access or accommodations needed for speakers, performers, special guests?
- Contact Bon Appétit if providing food or beverages for event. Determine menu, linens, centerpieces. Determine number of tables, trash cans, needed for food service and ask Scheduling Services to add to 25Live reservation.
- Contact AIT if AV staff is needed to operate sound system, lighting or record event
- Contact Bookstore if book table is desired.

Intermediate Update: 4 - 8 weeks prior to event

- Make arrangements for speaker, performer, special guests
 - Travel
 - Lodging
 - Meals
- Obtain completed W-9 forms or SS # of paid participants. Send completed forms to Accounting & Purchasing.
- Obtain photo and media release forms from speakers or performers.
- Contact Scheduling Services (or appropriate scheduler) to release held dates/venues, adjust event reservation times or update room setup. Be sure reservation setup request includes tables needed for catering, books, registration.
- Work with Scheduling Services (or appropriate scheduler) to create a diagram of the room layout
- Finalize catering contract
- Finalize AV details with AIT staff

- Finalize promotional materials with MarCom
- Secure photographer
- Public Safety office needed for traffic or crowd control?
- Is a piano being used? Be sure it's listed on the 25Live reservation. Arrange for tuning with the Conservatory of Music and plan to pick up a key during office hours.
- Create timeline for the day of the event as well as the event itself
- Secure cell phone numbers of key participants and providers
- Determine/order decorations (banners, flowers)
- Arrange for payments/reimbursements (account numbers for internal transfers, check requests for honorariums, ThunderMart payments for all payment of fees to outside sources.).

Final Touches: 1 – 2 weeks prior to event

- Review rsvp responses
- Create nametags
- Confirm count with catering
- Confirm AV assistance with AIT
- Review [25Live](#) reservations and notify Scheduling Services or scheduler of any changes to reservation
- Upload Campus Announcements/Digital Signage to the AIT [website](#)
- Have posters approved in SAO and hang on approved boards

Day of Event

- Take vitamins and a deep breath. Smile!
- Call rain plan – notify Facilities setup crew, AIT, Bon Appétit catering, Scheduling Services
- Check venue setup 1 hour prior.
- Check in with service providers as necessary.

Post Event

- ❑ Evaluate your event within 3 days of its completion. List what was good, what could be improved and any comments. You will find this evaluation to be very helpful in the next event you plan.
- ❑ If this event recurs annually, copy the existing 25live reservation to create a request for the next year. Make changes in the copied 25Live request (new date, updated resources, things you want to change for next time.). If Scheduling Services isn't accepting requests for the next year yet, then make specific notes to yourself of changes you would like to make for the event the following year and reference those notes when you do submit the request for the next time.

Key Contacts and Resources for Events

[25Live](#) Software: Room reservations, request room setups, flag AV support, flag Bon Appétit catering, post event to online calendars

Scheduling Services [website](#): Event planning resources, FAQ, 25Live tutorials, scheduling policies

Scheduling Services Director: Karen.King@wheaton.edu

Bon Appétit Catering Manager: Samantha.Bauman@cafebonappetit.com

AV event support: Kerry.J.Haps@wheaton.edu, or Jeremy.Root@wheaton.edu

(AV Supervisor: John.Rorvik@wheaton.edu)

Marketing/Communications [Website](#): includes College Logos, Templates, Guidelines and Forms

Marketing Design: Contact at 630.752.5647

Marketing – Online and printed calendars: Meaghan.Falkanger@wheaton.edu