

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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- 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 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 to find the appropriate forms for permission to advertise in the ways referenced here.

- Postering/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.)