EVENT TIMELINE/CHECKLIST

Check these items off your To-Do List when planning your event!

FOUR TO SIX MONTHS TO A YEAR PRIOR TO EVENT

☐ Determine the purpose, format and target audience for event
☐ Create an estimated budget and get approval if necessary
☐ Select the date- before confirming it clear the date with calendars- double-check for conflicts with other major functions
  ▪ Resource: https://www.yale.edu/calendars
☐ Gather internal committee/event team
☐ Draw up preliminary guest list
☐ Select a name and/or theme of event
☐ Select and reserve a location (classroom, specialty space, conference center)
  ▪ Resource: https://conferencesandevents.yale.edu/venue-list
☐ Develop a rain plan (if outdoor event)
☐ Contract with hotels for room block (if necessary)
  ▪ Resource: See Preferred Vendor List
☐ Reach out to caterers for proposals and select most appropriate for event
  ▪ Resource: See Preferred Vendor List
☐ Reserve rental equipment such as tables, chairs, tents, etc.
  ▪ Resource: See Preferred Vendor List
☐ Develop plan for registration and what questions to ask attendees
☐ Confirm any program speakers (if booking)
☐ Plan any promotion and publicity of event

☐ TWO TO THREE MONTHS PRIOR TO EVENT

☐ Finalize agenda
☐ Select menus and confirm contract with caterer
☐ Reserve rental equipment such as tables, chairs, tents, etc.
  ▪ Resource: See Preferred Vendor List
☐ Determine audio visual needs (internal or external)
  ▪ Resource: https://yale.service now.com/it?id=service_offering&sys_id=d6688d6fbb31007ee2abc9f3ee41c
  ▪ Resource: See Preferred Vendor List
☐ Select and order favors, souvenirs, and other give-away items
  ▪ Resource: See Preferred Vendor List
☐ Write copy, design and get approval of printed invitations and all other printed materials
☐ Contact YPPS to coordinate the printed materials
  ▪ Resource: https://ypps.yale.edu/ordering-ypps
☐ Send save-the-date announcements to guests (3-5 months prior to the event)
☐ Send out invitations 4 – 6 weeks prior to event (depending on event)
☐ Decide on music, book entertainers and talent
  ▪ Resource: https://music.yale.edu/community/gig-list/
☐ Plan the decorations and color scheme
☐ Contact and/or meet with the florist to discuss floral and décor
  ▪ See Preferred Vendor List (Link)
☐ Contact security to submit request for YPD or Security Services
  ▪ Resource: https://your.yale.edu/request-police-or-security-services
☐ Book photographer or videographer
  ▪ Resource: See Preferred Vendor List
☐ Finalize hotel and transportation arrangements for presenters and guests
☐ Recruit staff or volunteers to work registration if needed

☐ TWO TO FOUR WEEKS PRIOR TO EVENT
☐ Meet with all vendors to review logistics specific to them
☐ Review and close registration (two weeks prior)
☐ Meet with all audio-visual vendors on final setup and needs and setup shared folder for presentation needs or other notes
☐ Submit any facilities work requests for trash, furniture moves, etc
  ☐ Resource: https://facilities.yale.edu/about-yale-facilities/requesting-services
☐ Confirm with access control that buildings will be green-lit and open at appropriate time
  ☐ Resource: E-mail 432.open@yale.edu
☐ Send detailed instructions (“know before you go”) to all staff and participants (including access, parking instructions, and maps)
☐ Send travel itineraries to each attendee outlining travel details (if booking travel for them)
☐ Finalize details with caterer, rental company, and all other vendors
☐ Create a diagram of the room/building to be used as a seating chart or for set up

☐ ONE WEEK PRIOR TO EVENT
☐ Create a logistical outline - “day of” schedule - outlining all deliveries, etc, and timing for the event – share with vendors
☐ Create “run of show” for production (if applicable) for event production – share with vendors
☐ Print registration list in alphabetical order
☐ Approve and finish place cards, table cards, and name tags and place in alphabetical order
☐ Plan a meeting or contact all staff, greeters, ambassadors and volunteers on their duties
☐ Finalize with catering final guarantees and setup (typically 5 days prior to event)
☐ Prepare event supply bag with any supplies, such as tape, string, zip ties, staplers, clipboard, baskets, etc. you may need

☐ EVENT DAY
☐ Arrive at least 1.5 hours before event start time
☐ Bring the logistical outline, run of show (if applicable), contact list, BEOs, seating charts, name tags (alphabetized), table assignments, VIP guest lists, and the event supply bag with you
☐ Check all facilities (restrooms, lobby, meeting rooms, classrooms)
☐ Confirm that access is granted to space (green-lit)
☐ Set up event venue with tables, signage, table tents, awards, etc.
☐ Conduct sound, a/v and computer checks
☐ Check catering setup and menus
☐ Set bottled water or water pitcher and glasses at podium or panel table
☐ Set up registration to be ready to open (45) minutes prior to event
☐ Relax and smile! You did it!

☐ POST EVENT
☐ Send thank you and follow-up notes to staff, volunteers and vendors
☐ Request final bills from all vendors
☐ Finalize billing and prepare final budget for event
☐ Conduct post-event meeting to discuss success or ways to improve in the future
☐ Survey attendees (optional)