



# University of California, Merced Event Planning Timeline

Event Name

Event Date

*Note: Not all items on this list are required for every event. This timeline is to be used as a guide, as unique circumstances must be considered when planning your event.*

## Six Months to One Year in Advance

- \_\_\_ Determine the goal of your event and select the appropriate format for your message
- \_\_\_ Outline a budget estimate and seek appropriate approval
- \_\_\_ Select the date, after review of calendars for key participants, the University, and community
- \_\_\_ Discuss roles and responsibilities with other supporting units
- \_\_\_ If requesting the Chancellor's participation, contact the Office of the Chancellor
- \_\_\_ Select and reserve a venue, and obtain agreement in writing
- \_\_\_ Select guest list categories and begin master guest list
- \_\_\_ Notify External Relations if UC Merced Foundation trustees, major donors and/or dignitaries are to be invited
- \_\_\_ Choose a theme
- \_\_\_ Develop a rain plan (if scheduled for an outdoor venue)
- \_\_\_ Select a caterer and hold initial meeting to discuss event
- \_\_\_ Reserve hotel accommodations, if needed
- \_\_\_ Outline décor needs
- \_\_\_ Choose and order favors/give away items, if needed
- \_\_\_ Select and order any plaques, awards, etc.
- \_\_\_ Reserve rental equipment needed from external vendors
- \_\_\_ Confirm event speakers, including a master of ceremonies
- \_\_\_ Write copy and design save the date mailing



# University of California, Merced Event Planning Timeline

- \_\_\_\_\_ If planning to serve alcohol, complete Alcohol Permit
- \_\_\_\_\_ Plan audio/visual presentations and hire necessary audio/visual support
- \_\_\_\_\_ Develop plan for publicity and promotion

## (Six Months to One Year in Advance, Cont.)

- \_\_\_\_\_ Discuss parking/transportation needs
- \_\_\_\_\_ Develop plan for any online components, including online registration

## Three to Six Months In Advance

- \_\_\_\_\_ Write copy and design printed invitations, seek approval before printing
- \_\_\_\_\_ Finalize and get approval for guest list
- \_\_\_\_\_ Confirm program speaking order, adhering to university protocols
- \_\_\_\_\_ Determine how invitations will be mailed (through UC Merced or external mailing house)
- \_\_\_\_\_ Mail save the date notifications (3-4 months before event)
- \_\_\_\_\_ Check in with program participants
- \_\_\_\_\_ Request bio information and photograph/headshot for publicity, if applicable

## Two Months in Advance

- \_\_\_\_\_ Submit work order to Facilities Management for set up/logistical needs/materials
- \_\_\_\_\_ Complete guest list with addresses and prepare for mailing
- \_\_\_\_\_ Send out invitations 4-6 weeks before the event
- \_\_\_\_\_ Finalize décor
- \_\_\_\_\_ Make hotel accommodations and transportation plans for out-of-town guests/dignitaries
- \_\_\_\_\_ Create signage needed for event (banners, directional, etc.)
- \_\_\_\_\_ Create menu cards, if needed





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- \_\_\_\_\_ Create table numbers, if needed
- \_\_\_\_\_ Contact Disability Services for assistance or questions with accommodations
- \_\_\_\_\_ Prepare draft of printed program
- \_\_\_\_\_ Request volunteer/staff support

## Two to Four Weeks in Advance

- \_\_\_\_\_ Finalize program and send to printer for production
- \_\_\_\_\_ Track RSVPs as they come back to your office
- \_\_\_\_\_ Continue event publicity and promotion
- \_\_\_\_\_ Send detailed briefing materials to presenters, including directions, parking info, etc.
- \_\_\_\_\_ Finalize arrangements with all vendors, including A/V, catering, material suppliers
- \_\_\_\_\_ Write speeches and introductions; seek approval
- \_\_\_\_\_ Giveaways should be received and prepped for distribution
- \_\_\_\_\_ Visit venue for walk through
- \_\_\_\_\_ Develop master timeline for event day(s)
- \_\_\_\_\_ Create volunteer briefing materials for volunteers/staff

## One Week in Advance

- \_\_\_\_\_ Contact "No Replies" on the RSVP list to avoid unexpected attendees
- \_\_\_\_\_ Receive printed program, pull at least 2 for your file
- \_\_\_\_\_ Print guest list in alphabetical order and also by table number for easy reference
- \_\_\_\_\_ Create nametags, place cards, and seating chart
- \_\_\_\_\_ Provide detailed advance packet to hosts with VIP backgrounds and other pertinent info
- \_\_\_\_\_ Collect plaques, awards and other presentation materials
- \_\_\_\_\_ Finalize remarks and create master script book for podium (tabbed for each speaker)



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- \_\_\_\_\_ Send electronic version of script to each presenter for final review
- \_\_\_\_\_ Confirm security arrangements with UCMPD
- \_\_\_\_\_ Create seating diagrams of room
- \_\_\_\_\_ Send final instructions to volunteers
- \_\_\_\_\_ Review responsibilities with event support staff

## (One Week in Advance, Cont.)

- \_\_\_\_\_ Confirm guest count with catering
- \_\_\_\_\_ Prepare event box with needed supplies

## Event Day

- \_\_\_\_\_ Arrive early
- \_\_\_\_\_ Bring final copies of all planning documents for reference, including on a flash drive
- \_\_\_\_\_ Bring cue book for podium
- \_\_\_\_\_ Greet volunteers and brief them on their responsibilities
- \_\_\_\_\_ Examine venue to ensure all details have been covered
- \_\_\_\_\_ Setup venue with signage, favors, awards, etc.
- \_\_\_\_\_ Perform sound, video and lighting checks
- \_\_\_\_\_ Setup registration table at least 1 hour before event start time

## Following the Event

- \_\_\_\_\_ Collect all needed invoices and process for payment
- \_\_\_\_\_ Send thank you notes to participants, volunteers and staff
- \_\_\_\_\_ Hold event debrief to examine successes and points for improvement
- \_\_\_\_\_ Make list of notations for the next event