

Suggested Event Planning TIMELINE

Note: Not all items will apply to all events.

This is a list to get you thinking about what planning items will go into your unique occasion.

Six to Twelve months out:

- Determine event date(s)
- Identify planning committee and/or key players for planning process
- Establish planning meeting frequency and times; schedule remaining planning meetings
- Develop event goals, objectives, program outline, and any key communication messages for printed and web-based materials
- Submit and confirm venue reservations (use Web Viewer for on-campus spaces)
- Submit and confirm lodging reservations (the Hanover Inn will confirm 18 months out; if using another area hotel, be sure to confirm their release date and note on lodging card, if sending one to guests)
- Identify constituencies for guest lists
- Confirm date with VIPs (on- and off-campus)
- Identify possible emcee, keynote speakers, etc.
- Prepare budget estimate
- Discuss invitation list and estimated yield
- Confirm invitation lists for events and meals; vet with necessary senior officers
- Design and develop event database for mailing invitations and tracking RSVPs
- Outline ceremony and dinner program to review with key officers
- Brainstorm gift ideas; identify gift vendors; work on design; and determine costs
- Contact designer for invitation and program designs; initiate design process; determine deadlines and costs; include accessibility information
- Identify specific speakers and program pieces; begin discussing AV needs
- Get sign offs on event program ideas

3 to 6 months out:

- Initiate "Save the Date" mailing (if needed)
- Gather speaker biographies (if needed for printed program)
- Obtain final approval of invitation design and copy
- Discuss press coverage and PR (if needed)
- Identify and reserve caterer and florist
- Reserve photographer
- Reserve entertainment

3 months out:

- Order gifts
- Check and order necessary supplies (i.e. name badge holders, pens, stamps, envelopes, notebooks, wrapping paper, ribbons, etc.)
- Finalize guest lists for ceremony and dinner
- Send invitation to printer
- Receive invitations from printer
- Confirm speakers and speaking order for ceremony and dinner; confirm topic, length of presentation, and AV requirements
- Contact guests requiring lodging; confirm arrangements/needs
- Contact florist to discuss design ideas
- Contact caterer to discuss menu and event
- Reserve security

2 months out:

- Address envelopes and assemble mailing
- Mail invitations (8 to 10 weeks out if list includes out-of-towners, 6 to 8 weeks if guests are all local)
- Obtain final approval of ceremony program copy
- Facility walkthrough with Conferences & Events, Classroom Technology Services, Safety & Security, facility manager and/or vendors (as needed)
- Determine if any directional signage will be needed at the event to assist guiding guests

Month of the event:

- RSVPs due (2-3 weeks prior to the event)
- Send rooming list to hotel(s) (the Hanover Inn requires list 3 weeks prior to arrival)
- Release unneeded hotel rooms by appropriate deadline (varies by hotel)
- Make any needed publicity/press arrangements
- Arrange to have any directional signage designed/printed
- Forward setup requests, including AV, to Conferences & Events and others as needed (3 weeks prior to the event)
- Send ceremony program to printer (3 weeks prior to the event or date determined by designer and printer)
- Send agenda, suggested dress, directions, map, and parking instructions to participants
- Make follow up phone calls/emails to pending guests
- Run first batch of name badges and place cards
- Wrap gifts
- Develop scripts for key speakers
- Draft and distribute ceremony and dinner cue sheets
- Plan seating arrangements for dinner
- Make list of photo opportunities for photographer; re-confirm photographer
- Re-confirm entertainment
- Set task assignments/determine responsibilities internally and with cosponsoring departments; distribute this "Schedule of Events" to all staff and volunteers working on the event (be sure to have extra copies on-site)
- Confirm catering order (48 hours out or time determined by caterer)
- Confirm set up, AV, florist, and Media Production orders
- Confirm Safety & Security's role
- Register alcohol "social event" with Safety and Security (if necessary)
- Confirm transportation of guests and VIPs
- Distribute guest list to appropriate parties
- Run final name badges and place cards
- Make confirmation phone calls/emails (if necessary)
- Set up an on-site run-through (if needed)
- Set up sound checks for speakers/musicians
- Print or email media/remarks release form for speakers to sign
- Confirm honorarium amount(s) for speakers and send requests to Admin. Finance Office for payment
- Finalize transportation needs of VIPs

Day of the event:

- ___ Arrive at location(s) early to check setups and be prepared to trouble shoot
- ___ Bring registration materials: guest lists, name badges, place cards, gifts, etc.
- ___ Review planning details and walk through the event with all staff and volunteers
- ___ Inform staff and volunteers of the location of restrooms, elevators, and accessible entrances
- ___ Be sure to have extra copies of all materials: schedule of events, agendas, cue sheets, photographer instructions, media releases, etc.
- ___ Check in with caterer and provide them with any last minute changes or special meal requests
- ___ Check weather report

Post event:

- ___ Distribute gifts to non-attendees
- ___ Distribute photographs of the event to VIPs and participants
- ___ Hold event debrief meeting
- ___ Complete comparison of actual versus budgeted costs
- ___ Send thank-yous
- ___ Update final event attendance in computer program used for RSVPs (i.e. attended, no show)
- ___ File all materials to assist with planning of future event(s)
 - Actual budget numbers
 - Receipts and invoices
 - Event planning notes (timeline included)
 - All event related emails (electronically on CD)
 - Debrief notes
 - AV and space set-up orders and diagrams
 - Written correspondence
 - Event handouts
 - Samples of ALL printed materials
 - Sample mailings
 - PR materials/newspaper articles mentioning the event
 - Photographs
 - Cue sheets
 - Schedule of events
 - Timeline
 - Catering order
 - Accept/Regret/Pending lists
 - Seating list and chart

If you have any questions or need additional assistance contact Conferences and Events at (603) 646-2923 or conferences.and.events@dartmouth.edu