

Event Timeline:
ADD EVENT NAME
ADD EVENT DATE

CHECK LIST AND ASSIGNMENTS

INTERNAL NOTE: Refer to the URAD Special Events website for additional campus resources: specialevents.sdsu.edu

| Action Item | Staff Assigned | Date Completed / Notes |
|---|--------------------------|------------------------|
| 6-9 Months Out: | | |
| Hold a planning meeting to define the purpose and goal of the event, determine the primary audience, and estimate attendance <i>Note: Identify event type (ceremony, lecture, reception, dinner, etc.)</i> | <input type="checkbox"/> | |
| Establish a budget and budget source – determine if you’ll use State or Foundation funding <i>Note: The State and Foundation have differing allowances, processes, and approvals.</i> | <input type="checkbox"/> | |
| Determine your stakeholders’ participation and availability (President, campus leadership, special guests, etc.) | <input type="checkbox"/> | |
| Identify the desired event venue and set up a site visit with venue staff | <input type="checkbox"/> | |
| Confirm the event date and time that works for all stakeholders – send a calendar proposal to all <i>Note: Be mindful of religious holidays and other SDSU events.</i> | <input type="checkbox"/> | |
| Request and confirm the event venue <i>Note: allow for set-up and tear-down time and ask about events taking place in the surrounding area; request a room diagram</i> | <input type="checkbox"/> | |
| Contact Special Events for a consultation (if desired) | <input type="checkbox"/> | |

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| 12 Weeks Out: | | | |
| Create a detailed "Day-Of" planning document - include vendor and speaker arrival times, speaker rehearsals, etc. | | <input type="checkbox"/> | |
| Identify and confirm the event speakers | | <input type="checkbox"/> | |
| Identify venue layout needs (seating, stage, registration, etc.) and update room diagram <i>Note: Confirm accessibility requirements (ADA seating, interpreters, captioning, etc.)</i> | | <input type="checkbox"/> | |
| Submit an EAS form if your event is held on-campus and outdoors <i>Note: All student organizations are required to complete the EAS form regardless of on-campus location.</i> | | <input type="checkbox"/> | |
| Create a timed event agenda (begin drafting remarks, determine speaking order, etc.) | | <input type="checkbox"/> | |
| Identify and coordinate audio/visual (AV) needs - is an outside AV vendor needed? | | <input type="checkbox"/> | |
| Draft the event invitation and determine the RSVP mechanism (will guests email a specific RSVP contact, use iModules, Google Forms, etc.?) | | <input type="checkbox"/> | |
| Secure parking arrangements with Parking and Transportation Services - do you need vehicle and pedestrian signs, wayfinding, parking permits, etc.? <i>Note: Confirm guest parking arrangements before the event invitation is distributed</i> | | <input type="checkbox"/> | |
| Submit a catering request to SDSU Catering - adhere to CSU Hosting Policies and Allowances; submit an Alcohol Request Approval Form, if applicable | | <input type="checkbox"/> | |
| Secure vendors (rentals, linen, florist, photographer, videographer, etc.) and submit Purchase Requisitions to set-up payment | | <input type="checkbox"/> | |
| Create an invitation list - include mailing address and email addresses based on event invitation distribution method | | <input type="checkbox"/> | |

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| Create the event invitation <i>Note: If you plan to send a printed event invitation, remember to include envelopes and postage in design and budget</i> | | <input type="checkbox"/> | |
| Draft guest communications to include: <ol style="list-style-type: none"> 1. "RSVP Confirmation" reply 2. "RSVP Reminder" email 3. "Event Reminder" email 4. "See You Today - Event Reminder" email | | <input type="checkbox"/> | |
| Create the RSVP method and include RSVP confirmation response – allow for notes to address accessibility issues and dietary needs <i>Note: If you're hosting a plated event, request guests' entrée selection at the time of their RSVP</i> | | <input type="checkbox"/> | |
| 8 Weeks Out: | | | |
| Identify a weather contingency plan | | <input type="checkbox"/> | |
| Determine entertainment needs - house music (Spotify access), live entertainment, or none? | | <input type="checkbox"/> | |
| Draft program remarks - include SDSU Land Acknowledgement, if applicable | | <input type="checkbox"/> | |
| Assess security needs - is a Disruption Protocol needed? | | <input type="checkbox"/> | |
| Assess StratComm support needs - is a Media Assessment needed? | | <input type="checkbox"/> | |
| Secure Sign Language Interpreters and/or Captioners - applicable for larger, public events | | <input type="checkbox"/> | |
| Walk the event space from the guest parking site to the venue and determine if a Facilities Work Order is required (sprinklers turned off, landscaping, etc.) | | <input type="checkbox"/> | |
| Send the event agenda to the President's Office for review (if the President is speaking) | | <input type="checkbox"/> | |
| Identify volunteers and create role/task list <i>Note: submit the request form for SDSU Ambassadors, if applicable</i> | | <input type="checkbox"/> | |

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| Distribute event invitation <i>Note: if you're sending a printed event invitation, follow it with the digital version one week later</i> | | <input type="checkbox"/> |
| 7 Weeks Out: | | |
| Determine print, graphic, and branding needs (name tags, place cards, table numbers, table-top signage, digital signage, PowerPoint, etc.) | | <input type="checkbox"/> |
| Send a digital version of the event invitation | | <input type="checkbox"/> |
| Request dietary (meals), parking, and accessibility needs from stakeholders, special guests, and speakers | | <input type="checkbox"/> |
| 3 Weeks Out: | | |
| Finalize program remarks - include SDSU Land Acknowledgement, if applicable | | <input type="checkbox"/> |
| Determine a post-event strategy and draft an "Event Follow-up" email to guests (include a link to photos, program recording, post-event survey, etc.) | | <input type="checkbox"/> |
| Request remarks from speakers – review all to make sure no one is duplicating talking points <i>Note: If desired, offer and coordinate a day-of rehearsal for speakers</i> | | <input type="checkbox"/> |
| Create an AV agenda | | <input type="checkbox"/> |
| Send a "RSVP Reminder" email to encourage more registrations | | <input type="checkbox"/> |
| Create a "Day-Of Contact List" – include phone numbers for speakers, vendors, Parking, SDSU Catering, staff, and volunteers | | <input type="checkbox"/> |
| 2 Weeks Out: | | |
| RSVP deadline date | | <input type="checkbox"/> |
| Confirm the final guest count with SDSU Catering | | <input type="checkbox"/> |

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| Create a guest list (include name, title, affiliation, etc.) | | <input type="checkbox"/> | |
| Create a seating chart (share with stakeholders for input and feedback) | | <input type="checkbox"/> | |
| Finalize event agenda – including speaker remarks | | <input type="checkbox"/> | |
| 1 Week Out: | | | |
| Address guests' special requests (parking, dietary, accessibility) and secure additional arrangements and resources | | <input type="checkbox"/> | |
| Send an "Event Reminder" email to guests and include parking information (consider including a student video to encourage attendance) | | <input type="checkbox"/> | |
| Share a Briefing Packet with stakeholders and speakers to include: <ol style="list-style-type: none"> 1. Agenda 2. Guest List (by alpha and table, if applicable) 3. Seating Chart (if applicable) 4. room diagram 5. copy of the event invitation 6. other pertinent event information and documents | | <input type="checkbox"/> | |
| Hold an AV/Tech rehearsal at the venue with AV staff | | <input type="checkbox"/> | |
| Re-confirm vendors (rentals, linen, florist, photographer, videographer, etc.) | | <input type="checkbox"/> | |
| Confirm and communicate special parking arrangements for President, campus leadership, special guests (if applicable) | | <input type="checkbox"/> | |
| Meet with volunteers to confirm roles and tasks | | <input type="checkbox"/> | |

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| Visualize the event from the perspective of: <ol style="list-style-type: none"> 1. your guests 2. special guests and speakers 3. campus leadership 4. the President (if applicable) Identify, address, and communicate any necessary adjustments | | <input type="checkbox"/> | |
| Create an event pile of printed items and event supplies that you'll take to the venue | | <input type="checkbox"/> | |
| Review "Day-Of" planning document and update accordingly to include arrival times for speakers, vendors, etc. | | <input type="checkbox"/> | |
| Print documents including: <ol style="list-style-type: none"> 1. "Day-Of" planning document 2. speaker remarks 3. Agenda 4. Guest List (by alpha and table, if applicable) 5. room diagram 6. copy of the event invitation 7. vendor contracts/statements 8. other pertinent event information and documents | | <input type="checkbox"/> | |
| Day-Of: | | | |
| Arrive early to coordinate set-up and meet vendors (rentals, linen, florist, photographer, videographer, etc.) | | <input type="checkbox"/> | |
| Send a final, day-of "See You Today - Event Reminder" email to guests | | <input type="checkbox"/> | |
| Place or check signage and wayfinding | | <input type="checkbox"/> | |
| Set-up registration/check-in tables (name tags) | | <input type="checkbox"/> | |
| Conduct an AV and mic check | | <input type="checkbox"/> | |
| Speaker rehearsals, if pre-scheduled | | <input type="checkbox"/> | |

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| Give speakers a 5-minute warning for the program start | | <input type="checkbox"/> | |
| Cue speakers and manage the event timeline/Run-of-Show | | <input type="checkbox"/> | |
| Coordinate tear-down | | <input type="checkbox"/> | |
| Post-Event: | | | |
| Create an Attendee List of guests who attended, cancelled, or no-showed | | <input type="checkbox"/> | |
| Send a post-event "Event Follow-up" email to guests (include a link to photos, program recording, post-event survey, etc., if available) | | <input type="checkbox"/> | |
| Process outstanding payments to vendors (rentals, linen, florist, photographer, videographer, etc.), Parking, SDSU Catering | | <input type="checkbox"/> | |
| Update and finalize the event budget | | <input type="checkbox"/> | |
| Send thank you notes to internal and external partners | | <input type="checkbox"/> | |
| Code attendees in your CRM | | <input type="checkbox"/> | |
| Conduct an internal post-event evaluation and document lessons learned | | <input type="checkbox"/> | |
| Create a post-event summary | | <input type="checkbox"/> | |
| Archive event materials | | <input type="checkbox"/> | |