

Event Planner Checklist

3 To 6 Months Ahead of the Event

- Determine the purpose of event.
- Allot a budget.
- Set a date.
- Decide on the number of guests.
- Choose the event theme (or mood).
- Interview and select a caterer/event planner.
- **CONTACT UMASS BOSTON CAMPUS CENTER TO RESERVE DATE AND CONTRACT EVENT.**
- Decide on music.
- Choose a florist.
- Engage a lighting specialist (if necessary).
- Consult a theme designer (for large events).
- Hire a photographer.

Be sure it is clear who is responsible for security, insurance, parking, coat check, advance publicity (in case of fundraising benefits or publicity events). If a non-profit organization is holding the function, check with event facility or caterer about state regulations concerning sales tax. Some states waive the tax but require a certificate that must be obtained in advance. For all the professionals you hire, have detailed arrangements and costs in writing and signed by both parties.

2 To 3 Months Ahead of the Event

- Make out a guest list.
- Have the invitations designed and printed.
- Arrange for hand addressing of the envelopes.
- Print paper napkins, matches, etc., with company logo.
- Have press kits designed and printed.
- Select and order the favors/product samples you plan to give to guests.

1 Month Ahead

- Mail the invitations.
- Finalize the menu.
- Print menu cards, where appropriate.
- Finalize décor and floral arrangements.
- Write and send news releases, where appropriate.
- If necessary, arrange to have pianos tuned.
- Check for any special audio visual equipment that is needed.
- Prepare any press releases or photos to be handed out in the press kits.

10-14 Days Ahead

- **CONFIRM LOGISTICS WITH UMASS BOSTON CAMPUS CENTER EVENTS COORDINATOR**

1 Week Ahead

- Complete final alphabetized guest and media lists.
- Write up name tags and have extras on hand.
- Do table assignments and place cards for sit-down dinners.
- Make sure tables have numbers of identifying markers.
- Send final alert to media assignment editors.
- Write and/or telephone media columnists who cover parties.
- Be clear with the caterer about who is responsible for cleanup and assign staff to assist, where necessary.
- Arrange for cash to pay delivery vendors and/or caterers.

1 Day Ahead

- Make final calls to assignment editors.
- Assign those staff members you want to be on hand to escort guests inside.
- If needed, make sure directional signs for the lobby are ready to be placed in strategic spots.
- Assemble favors, press kits or other giveaways.

On The Day of the Event

- Have your guest list, media list, name tags and/or tables alphabetized and ready at the door.
- Set out table numbers and place cards on tables according to charts.
- Post staff members to personally escort guests inside.
- Place any added theme accessories in rest rooms.
- Have favors, press kits or other giveaways ready.

Event FOLLOW-UP

- Pay bills.
- Plant gossip column items or send follow-up releases where appropriate.
- Write thank-you notes.
- Send flowers or gifts to those who made a special contribution.

Stay One Step AHEAD

- **RESERVE FOLLOWING YEAR'S EVENT DATE WITH UMASS BOSTON CAMPUS CENTER**