

Suggested Event Planning Timeline

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 special occasion.

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 president's participation, contact the President's Office
- Select and reserve a venue, and obtain agreement in writing
- Select guest list categories and begin master guest list
- If dignitaries are to be invited, notify the Office of University Events for assistance
- 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
- 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
- If planning to serve alcohol, seek appropriate permission from Office of University Events
- Plan audio/visual presentations and hire necessary audio visual support
- Develop plan for publicity with your communications director or News and Information Services
- Discuss parking/transportation needs with WVU Transportation Office
- Develop plan for any online components

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 protocol
- Determine how invitations will be mailed (through your unit or other entity?)
- Mail save the date notifications (3-4 months before event)
- Check in with program participants and
- Offer suggestions for their remarks
- Request bio information and photograph/headshot for publicity
- Add your event to the online University event calendar (available from the WVU Homepage)

(Three to Six Months In Advance, Cont.)

- Confirm event entertainment, and obtain agreement in writing
- Confirm event menu with caterer
- Select and meet with a florist
- Develop security plan with University Police
- Request/hire a photographer
- Develop a layout of your venue and determine where specific activities will take place
- Confirm support staffing
- Request volunteer staffing
- Continue to update website with event details as needed

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)
- Finalize program and send to printer for production
- Create menu cards if needed
- Contact the Office of Disability Services for assistance with accommodations
- Prepare draft of printed program

Two to Four Weeks in Advance

- Track RSVPs as they come back to your office
- Prepare registration packets
- Continue event publicity
- Send detailed instructional packet 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
- Create table numbers
- Create seating diagrams of room
- Visit venue for walk through
- Receive printed program, pull at least 2 for your file
- Develop master timeline for event day(s)

One Week in Advance

- Contact “No Replies” on the RSVP list to avoid unexpected attendees
- Print guest list in alphabetical order and also by table number for easy reference
- Create nametags, placecards, 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)
- Send electronic version of script to each presenter for final review
- Confirm security arrangements with University Police
- Create table numbers
- Create seating diagrams of room
- Develop master timeline for event day(s)
- Send final instructions to volunteers
- Review responsibilities with event support staff
- Confirm guest count with catering
- Prepare event box with needed supplies (see Event Box Checklist)

Event Day

- Arrive at least 2 hours early
- Wear comfortable shoes!
- Bring final copies of all planning documents for reference
- Bring vendor forms for entertainment payment
- Bring script book for podium
- Greet volunteers and brief them on their responsibilities
- Examine venue to ensure all details have been covered
- Set up venue with signage, favors, awards, etc.
- Perform sound, video and lighting checks
- Set up registration table at least 30 minutes before event start time

Following the Event

- Collect all needed invoices and process for payment
- Send thank you notes to participants, volunteers and staffers
- Hold event review to examine successes and points for improvement
- Conduct survey of attendees to gauge success
- Make list of notations for the next event
- Pull tearsheets and media clips for your file
- Complete file with documents of record