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

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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
Event Planning Timeline

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)
University of California, Merced
Event Planning Timeline

___ 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