

Event: _____

Date: _____

Location: _____

Time: _____

Notes:

___ Guest List (12 weeks prior) Date Due: _____

- ___ Determine guest list
- ___ Request list of possible guests from Advance
- ___ Create database and determine invitees based on event criteria
(i.e. alumni only or donors at certain level of giving)
- ___ Create database for mail merge
- ___ Notify required faculty members to save the date

___ Research and gather information from various locations
(9 weeks prior) Date Due: _____

- ___ Choose location and contact POC
- ___ Make reservations
- ___ Confirm reservations and agreement prior to event
- ___ Choose and book caterer and menu
- ___ Confirm catering agreement and payment prior to event
- ___ Choose entertainment
 - ___ Confirm entertainment agreement and payment prior to event
- ___ Book CSU photographer
 - ___ Confirm photography agreement and payment prior to event
- ___ Confirm program details and request speakers
 - ___ Confirm program speakers
- ___ Create program schedule for speakers
 - ___ Create program, route for approval and send to printers

- ___ Choose and purchase decorations or flowers and arrange delivery and set-up
- ___ Choose and purchase “favors” and arrange delivery and set-up

- ___ Invitations (10 weeks prior) Date Due: _____
 - ___ Draft invitation letter and route for approval
 - ___ Create invitations and envelopes
 - ___ Send invitations and track RSVPs and change of address returns
(4 weeks prior) Date Due: _____

- ___ Follow-up phone calls (2 weeks prior) Date Due: _____
 - ___ Create phone call list
 - ___ Complete follow-up phone calls
 - ___ Track RSVPs
 - ___ Complete contact reports for phoned alumni and donors
 - ___ Send required tickets and information to guests.

- ___ Complete meeting notes Date Due: _____
(2 weeks prior)
 - ___ Send meeting notes to participants

- ___ Remind guests of event via telephone or e-mail (1 day prior)

- ___ Event Follow-Up (no later than 1 week after event)
 - ___ Draft thank you notes and route for approval and signature
 - ___ Send thank you notes and any information requested at event
 - ___ Download and post photos and send email with link to attendees
 - ___ Complete payment to vendor
 - ___ Complete report with receipts
 - ___ Complete contact reports
 - ___ Create file for event