

EVENT OVERVIEW

Event Name:	
Date:	
Time:	
Location:	
Event Lead Contact(s):	
Audience:	

EVENT PLANNING TIMELINE & CHECKLIST

5-9 Months Prior (minimum of 90 days prior)

Activity	Owner	Due Date	Status
Host a planning meeting with all key stakeholders: Establish event objective(s) and key outcomes. How will objectives be tracked and measured? Who are the internal and external stakeholders involved? If this is a repeat event, review previous event(s) and make changes based on historical data, debriefing sessions and stakeholder feedback			
Determine target audience - who will be attending (current students, corporate partners, alumni, faculty, staff, Dean's office, etc.)?			
Create an event budget and determine funding (see sample budget)			
Determine event date - be sure to consider the availability of facilities, the speaker(s), audience, major holidays, student schedules and other events taking place in the school			
Determine space needs at Ivey and book event space through Facilities . Alternatively if hosting off-site, contact the venue to check availability and costs. If hosting in Toronto, additional details can be found here . We recommend booking space as far in advance as possible to ensure availability.			
Risk assessment – Identify possible risks and develop strategies to minimize risk			
Create a draft event schedule and an itinerary for hosting any guests on campus (see sample itinerary for hosting a guest on campus)			
Invite speaker(s)/panelist(s)/moderator(s). If guest is an alumni, be sure to connect with Alumni Relations prior to reaching out.			
If event is sponsored, reach out to corporate partner to book a planning meeting			
If required, book accommodations and/or make travel arrangements for any out of town guests (provide guest with confirmation number and hotel details)			

2-4 Months Prior

Activity	Owner	Due Date	Status
Host regular check-in/planning meetings leading up to the event with key stakeholders			
Follow up with corporate sponsors with event details, request logos (if needed), request guest names, etc.			
Create marketing materials (request assistance from the Marketing team if needed)			
Create a registration website , if needed. If serving food, ensure that you ask guests about dietary restrictions as part of their registration			
Secure volunteers to assist with event if needed			
Finalize guest list (corporate partners/alumni/students/special guests)			
Finalize all speakers/panellists/moderators			
Finalize event schedule			
Request assistance from Classroom Technology Services (CTS) if AV is required			

1-2 Months Prior

Activity	Owner	Due Date	Status
Finalize all details with the caterer (if alcohol will be served at your event, it must be ordered a minimum of 1 month in advance through Great Hall Catering). Be sure to provide any special dietary requests in advance.			
Develop feedback survey for post-conference (Qualtrics is the recommended survey tool to use)			
Finalize Event Running Order/'day of' timeline (sample can be found here) and assign responsibilities			
Purchase all speaker/moderator/panellist gifts - thank you cards can also be purchased at from the Ivey Trading Company.			
Provide CTS (Classroom Technology Services) with AV requirements			
Provide Terri Garton, Alumni Relations with a list of any guests and/or presenters attending your event who are alumni of the school			

1-2 Weeks Prior

Activity	Owner	Due Date	Status
Provide venue/caterer with a confirmed guest count (typically due a minimum of 3 business days prior to event)			
Finalize confirmation of all AV and room setup/facility needs			
Ensure gifts/thank you notes for speakers/panellists/moderators are ready to go			
Communicate final 'day of' timeline to all involved and ensure everyone is aware of their responsibilities			
Print and assemble name badges (name tag details and a template can be found here)			
Assemble any welcome packages if needed			
Send final communication to all participants 1 week in advance of the event. Include parking, final agenda and any other key details for the event			

Post Event

Activity	Owner	Due Date	Status
Send thank you emails to sponsors, speakers, and panellists			
Send out feedback survey (after survey deadline, analyze and disseminate feedback to key stakeholders)			
Schedule debrief meeting with planning team - review survey results, "did-wells" and "next-times" or opportunities for improvement (keep detailed notes)			
Reconcile all expenses			