## 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)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Owner</th>
<th>Due Date</th>
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</thead>
<tbody>
<tr>
<td>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</td>
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<tr>
<td>Determine target audience - who will be attending (current students, corporate partners, alumni, faculty, staff, Dean’s office, etc.)?</td>
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<td>Create an event budget and determine funding (<a href="#">see sample budget</a>)</td>
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<td>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</td>
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<tr>
<td>Determine space needs at Ivey and book event space through <a href="#">Facilities</a>. Alternatively if hosting off-site, contact the venue to check availability and costs. If hosting in Toronto, additional details can be found <a href="#">here</a>. We recommend booking space as far in advance as possible to ensure availability.</td>
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<td>Risk assessment – Identify possible risks and develop strategies to minimize risk</td>
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<tr>
<td>Create a draft event schedule and an itinerary for hosting any guests on campus (<a href="#">see sample itinerary for hosting a guest on campus</a>)</td>
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<td>Invite speaker(s)/panelist(s)/moderator(s). If guest is an alumni, be sure to connect with Alumni Relations prior to reaching out.</td>
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<td>If event is sponsored, reach out to corporate partner to book a planning meeting</td>
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<td>If required, <a href="#">book accommodations</a> and/or <a href="#">make travel arrangements</a> for any out of town guests (provide guest with confirmation number and hotel details)</td>
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### 2-4 Months Prior

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<tbody>
<tr>
<td>Host regular check-in/planning meetings leading up to the event with key stakeholders</td>
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<td>Follow up with corporate sponsors with event details, request logos (if needed), request guest names, etc.</td>
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<td>Create marketing materials (<a href="#">request assistance</a> from the Marketing team if needed)</td>
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<td>Create a registration website, if needed. If serving food, ensure that you ask guests about dietary restrictions as part of their registration</td>
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<td>Secure volunteers to assist with event if needed</td>
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<td>Finalize guest list (corporate partners/alumni/students/special guests)</td>
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<tr>
<td>Finalize all speakers/panellists/moderators</td>
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<tr>
<td>Finalize event schedule</td>
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<tr>
<td>Request assistance from <a href="#">Classroom Technology Services (CTS)</a> if AV is required</td>
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1-2 Months Prior

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<tr>
<td>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.</td>
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<td>Develop feedback survey for post-conference (<a href="#">Qualtrics</a> is the recommended survey tool to use)</td>
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<td>Finalize Event Running Order/'day of' timeline (sample can be found <a href="#">here</a>) and assign responsibilities</td>
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<td>Purchase all speaker/moderator/panellist gifts - thank you cards can also be purchased at from the Ivey Trading Company.</td>
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<td>Provide CTS (Classroom Technology Services) with AV requirements</td>
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<tr>
<td>Provide Terri Garton, Alumni Relations with a list of any guests and/or presenters attending your event who are alumni of the school</td>
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1-2 Weeks Prior

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<tr>
<td>Provide venue/caterer with a confirmed guest count (typically due a minimum of 3 business days prior to event)</td>
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<td>Finalize confirmation of all AV and room setup/facility needs</td>
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<td>Ensure gifts/thank you notes for speakers/panellists/moderators are ready to go</td>
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<td>Communicate final 'day of' timeline to all involved and ensure everyone is aware of their responsibilities</td>
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<td>Print and assemble name badges (name tag details and a template can be found <a href="#">here</a>)</td>
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<td>Assemble any welcome packages if needed</td>
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<td>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</td>
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Post Event

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<tr>
<td>Send thank you emails to sponsors, speakers, and panellists</td>
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<tr>
<td>Send out feedback survey (after survey deadline, analyze and disseminate feedback to key stakeholders)</td>
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<td>Schedule debrief meeting with planning team - review survey results, “did-wells” and “next-times” or opportunities for improvement (keep detailed notes)</td>
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<td>Reconcile all expenses</td>
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