** Event Planning Checklist**

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| **Event:** |  |
| **Location:** | **Date/Time of Event:** |
| **Committee Chairperson:** | **Contact information:** |
| **Committee Members:** | **Contact Information:** |
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**Board Meeting Prior to Event?** Yes No

If answer is yes, then a separate space must be available prior to the event for 2 hours. Approximate number of people attending board meeting will be 8-12. Have venue supply water during meeting.

**Speaker Checklist**

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| **Task:** | **Responsibility** | **Completion Date** |
| Contact and schedule speaker(s) |  |  |
| Costs Involved (speaker fee, travel costs including flight, hotel, transportation to and from event, meals, etc.) Note all budgeted expenses in the Event Budget document. **Get W9 from any speaker we pay $600+.** |  |  |
| If applicable, set up all accommodations for the speaker. Submit options for all costs associated with speaker to the Board and Financial Director for final selection. |  |  |
| Contract – required by National. If speaker does not have their own contract, then we have a generic contract for them to sign. **The contract must be submitted to National 4-6 weeks prior to event.** |  |  |
| What equipment will be needed by speaker for presentation? Confirm that venue offers what is required. |  |  |
| Assemble welcome information for speaker. |  |  |
| Obtain invoice from speaker and submit to Financial Director with Expense Report prior to event so payment can be made by check at the event. If invoice is not available prior to the event then payment will be made per the terms of the contract. |  |  |

Speaker Notes: If presentation is an IDCEC approved CEU, make sure speaker has the appropriate paperwork needed for credit submittal. All submittals are done by the speaker from the information obtained through the signup sheet that is passed around at the event.

***Find Event Budget and Expense Report documents under the Resources Tab – Templates & Forms on the Chapter Website.***

**Catering Checklist**

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| **Task:** | **Responsibility** | **Completion Date** |
| Select caterer, if applicable. Note all budgeted expenses included with the catering in the Event Budget document. **Get W9 from any caterer we pay $600+.** |  |  |
| Contract – required by National. If caterer does not have a contract, then we can provide a generic contract for them to sign. **The contract must be submitted to National 4-6 weeks prior to event.** |  |  |
| Give final guest count to caterer |  |  |
| Obtain invoice from caterer and submit to Financial Director with Expense Report prior to event so payment can be made by check at the event. If invoice is not available prior to the event then payment will be made per the terms of the contract. |  |  |
| Make arrangements for leftover food/drinks. Can food be donated? |  |  |

Catering Notes: If there is an opportunity to use recycled/recyclable plates and napkins please do so.

**Communication Checklist**

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| **Task:** | **Responsibility** | **Completion Date** |
| Submit your plans and concepts for the communication timeline to the Communication Director & Chapter Administrator. Follow the Social Media Post & Graphics Standards document. Timeline should include save the date added to the eblast, event posted on website and social media, date for registration to go up and be taken down. **Chapter Admin handles event registration.** |  |  |
| Create a Save the Date invite graphic using Canva (there’s a free version) or by reaching out to a Board Member to connect you with a volunteer. Follow the Social Media Post & Graphics Standards document. Information needs to be sent to the Chapter Administrator, (deadline is Friday at noon for following week’s e-blast). |  |  |
| Create event invitation using Canva or similar. This should be a jpg document that can be emailed as an attachment or viewed from the link on the event page of the blast and website. Follow the Social Media Post & Graphics Standards document. |  |  |
| Work with Chapter Administrator to open registration (Deadline is Friday at noon for following week’s e-blast). Include details on content for “thank you for registering email.” |  |  |
| Provide content and dates of posts for Facebook, Instagram, and LinkedIn to Administrator to advertise event via social media. |  |  |
| **Work with Board Members to determine if Chapter Sponsors qualify for any benefits related to the event.** |  |  |
| Include Chapter Sponsors information digitally to be presented at event by level of sponsorship. (There are no sponsorship banners.) |  |  |
| Send registration spreadsheet to Administrator at least 2 days prior to event so they can print name tags, arrange to pick up and bring to event. Put in reusable name tag sleeves from storage unit. |  |  |
| Recruit at least 2-3 people (can be students) to work at the registration table. |  |  |
| Post event recap and photos sent to Communications Director. |  |  |

Communication notes: All events should have a registration cutoff date of at least one day prior to the event. Be sure to note that registration is still available at the door with **PayPal Here, cash or check only**. Cost for registration at the door should be higher to encourage registration early.

**General Tasks:**

* Prepare a budget for event using the Event Budget form and submit to Finance Director. Finance Director will communicate ASID Allocated Funds by event. (All individual costs over $1000 need to be approved by a board vote.)
* Registration costs for each event will be determined once budget is established. Fees should be different for students, student members, ASID members and non-members.
* If you are soliciting Event specific sponsorships, keep sponsorships to $250 or below. Direct sponsor’s to submit payment via the ASID Wisconsin website under the Sponsorship tab. Keep track of sponsorship income in the Event Budget.
* Recognize our Chapter Sponsors by level in a digital presentation at the beginning of the event – ask board member for the sponsorship PowerPoint.
* Collect name tags after event and return to administrator.
* All original receipts for purchases made by committee members must be submitted to the board member overseeing the event with an Expense Report for approval. Board member will then forward to the Financial Director for reimbursement.